



## **Request for Proposal**

*Ollie Court Accounting Services*

Proposals Due

Friday, February 16, 2024 at 5:00 pm

Solicitation Coordinator

**Matt Salazar**

PH: (541) 682-2528

Email: [msalazar@homesforgood.org](mailto:msalazar@homesforgood.org)



100 West 13th Avenue, Eugene, OR 97401 • PH 541-682-3755 • FAX 541-682-3411



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## BASIC OVERVIEW

<b>RFQ Release Date</b>	February 2, 2024
<b>Submission Due Date &amp; Time</b>	February 16, 2024 – 5:00 pm
<b>Submission Methods</b>	Submit via email to <a href="mailto:msalazar@homesforgood.org">msalazar@homesforgood.org</a>
<b>Maximum Number of Contracts Awarded</b>	1
<b>Agency Contact</b>	Matt Salazar <a href="mailto:msalazar@homesforgood.org">msalazar@homesforgood.org</a> (541) 682-2528
<b>Questions Regarding the RFQ</b>	February 16, 2024 – 12:00 PM <a href="mailto:msalazar@homesforgood.org">msalazar@homesforgood.org</a> (541) 682-2528



## HOMES FOR GOOD OVERVIEW

### WHO WE ARE...

Homes for Good is Lane County's housing agency and our primary work is to help low-income residents with the logistics of affordable housing. At a higher level, we are neighbors united to get every Lane County resident who needs help, into a home.

### WHAT WE DO...

- ❖ Rental Assistance Vouchers
- ❖ Help veterans, seniors and people with disabilities find and secure affordable housing
- ❖ Match low-income residents with public and assisted housing units
- ❖ Partner with other community organizations and non-profits to build, finance and develop affordable housing
- ❖ Connect residents with self-sufficiency programs and wellness supports
- ❖ Work with the low-income community to provide help with weatherization improvements that lower utility bills and keep homes more comfortable
- ❖ Raise awareness about the need for low-income and affordable housing in Lane County

### AFFORDABLE HOUSING ADVOCATES...

We work to raise awareness about the need for – and lack of – affordable housing here in Lane County and more broadly. There is no question that the need for affordable housing will only grow as our population increases and high demand for housing pushes rents and prices up. We believe every person should have a home and that we must proactively and aggressively work toward that goal for the good of our community, state and nation.

### DIVERSITY EQUITY AND INCLUSION

Our goal is to address racial disparities within our organization in our hiring and promotion practices, greater opportunities in contracting and equitable services available to the people we serve. We want to establish Equity as part of our DNA as an organization



## Scope of Work

Homes for Good Housing Agency is seeking proposals from qualified professional Tax Credit Accountant for Accounting, Certification, and Advisory Services for Affordable Housing Development at the Ollie Court project in Eugene, OR. Ollie Court is a new construction 4% LIHTC project consisting of two buildings with 81 residential units and a ground floor commercial space consisting of an Early Learning Center in one of the buildings. Ollie Court has been funded with a combination of LIFT funds, 4% Tax Credits and several other gap funds. An investor and lender have been selected and financial closing and start of construction is expected to occur in July 2024 with construction expected to complete in September 2025.

The following outline includes expected services needed by the Agency. Additional services would be agreed to by both parties and provided on an as-needed basis.

### Predevelopment

- Deal structuring
- Tax analysis of limited partnership agreement
- Preliminary 50% test reports for tax-exempt bonds
- Consulting

### During construction

- 10% Carryover reports
- Analysis of Eligible Basis
- Cost Certifications
- Final 50% test reports for tax-exempt bonds
- Initial-Year and 15-Year credit calculations
- Credit adjuster calculations
- Assistance with Placed-In Service packages in expediting issuance of Forms 8609

### Operations

- Debt service coverage ratio calculations
- Consulting on compliance monitoring
- Analysis of partner capital accounts
- Minimum gain analysis

### Year 15 strategies

- Investor exit strategies
- Sale analysis
- Exit tax calculations
- Consulting

- ❖ All Qualified contractors, all Minority Business Enterprises and Section 3 businesses are encouraged to participate in this solicitation.
- ❖ All questions should be directed to the Solicitation Coordinator

Proposals shall be sent by email (no fax), by **Friday, February 16, 5:00 pm** and can be sent by email to the solicitation coordinator at [msalazar@homesforgood.org](mailto:msalazar@homesforgood.org).

See proposal forms for any additional instructions.



## Submission Requirements

Your response to the Request for Proposal must contain all the information requested along with acknowledgment of all attachments. A completeness check will be conducted for each submission. Incomplete submissions will not be accepted. Submissions should include the items organized to correspond to each requirement below:

### **General**

Proposals will be clear and concise.

### **Cover Letter**

All proposals must be accompanied by a cover letter signed by an individual who is legally authorized to enter into a contract on behalf of the proposing individual/firm. The letter must designate the Proposer's contact person during the proposals review process. Also, include a statement that the submission is a firm offer for a 90-day period.

### **Additional Services**

If it should become necessary for Homes for Good to request the organization to render additional services to either supplement the services requested in the RFP or to perform additional work, then such additional work shall be performed only if set forth in an addendum to an engagement letter between Homes for Good and the organization. Any such additional work agreed to between Homes for Good and the firm shall be performed at the same rates set forth in the fee proposal. Submit an hourly fee estimate for additional services.

### **References**

Provide a minimum of three (3) references for Accounting Services for organizations whom you have provided similar services. Please provide a description of the services provided and type of projects and location of projects with the references.

### **Qualifications**

Include a detailed statement of qualifications for the organization. This should include organizational history, clients presently served and capacity to complete the scope at Ollie Court. Maximum points will be given to firms that have significant experience locally and in Oregon.

### **Resumes**

Include a resume for all personnel that will be included in the services for Ollie Court.

### **Diversity Equity & Inclusion (DEI)**

Please include the firm's DEI strategies. This section will be evaluated on firm's commitment to engaging diverse populations particularly those facing disparities. Maximum points will be given to firm's that have formally adopted Diversity, Equity, and Inclusion strategies and/or MWESB strategies.



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### **Fee Proposal**

In the Fee Proposal, provide costs for Accounting, Certification, and Advisory Services for the services listed in the scope of work that would be required through lease-up and stabilization of the project.



## Expectations & Timeline

### **Insurance Coverage Requirements**

At signing of engagement letter, the awarded firm is required to provide the Agency with Certificates of Insurance showing the following Insurance is in force and will insure all operations under this contract. Firm shall not cancel, materially change, or not renew insurance coverages during the period of this contract. Any insurance bearing any adequacy of performance shall be maintained after completion of the contract for the full warrant/guarantee period. Nothing contained in the insurance requirements is to be construed as limiting the extent of the Firm's responsibility for payment of damages resulting from the Firm's operation while engaged with Homes for Good.

### **General Contractor's General Liability**

- ❖ **Workers' Compensation:** In accordance with State Law, the general Contractor, its subcontractor, and all employers working under the contract are subject employers under the Oregon Workers' Compensation Law and shall comply with ORS 656.017, or otherwise be exempt under ORS 656.126.
- ❖ **Automobile Liability:** For owned and non-owned motor vehicles used on the site or in connections therewith for a combined single limit for bodily injury and property damage of not less than \$500,000 per occurrence.
- ❖ **Commercial General Liability & Professional Liability:** The minimum limit of liability shall be \$2,000,000 per occurrence written, with a combined single limit for bodily injury and property damage.

The General Contractor's General Liability policy shall name the Agency as Additional Insured for this project, with an attached Endorsement Page, showing the additional insured as:

[ Homes for Good Housing Agency  
100 West 13th Avenue  
Eugene, OR 97401 ]

### **Payment**

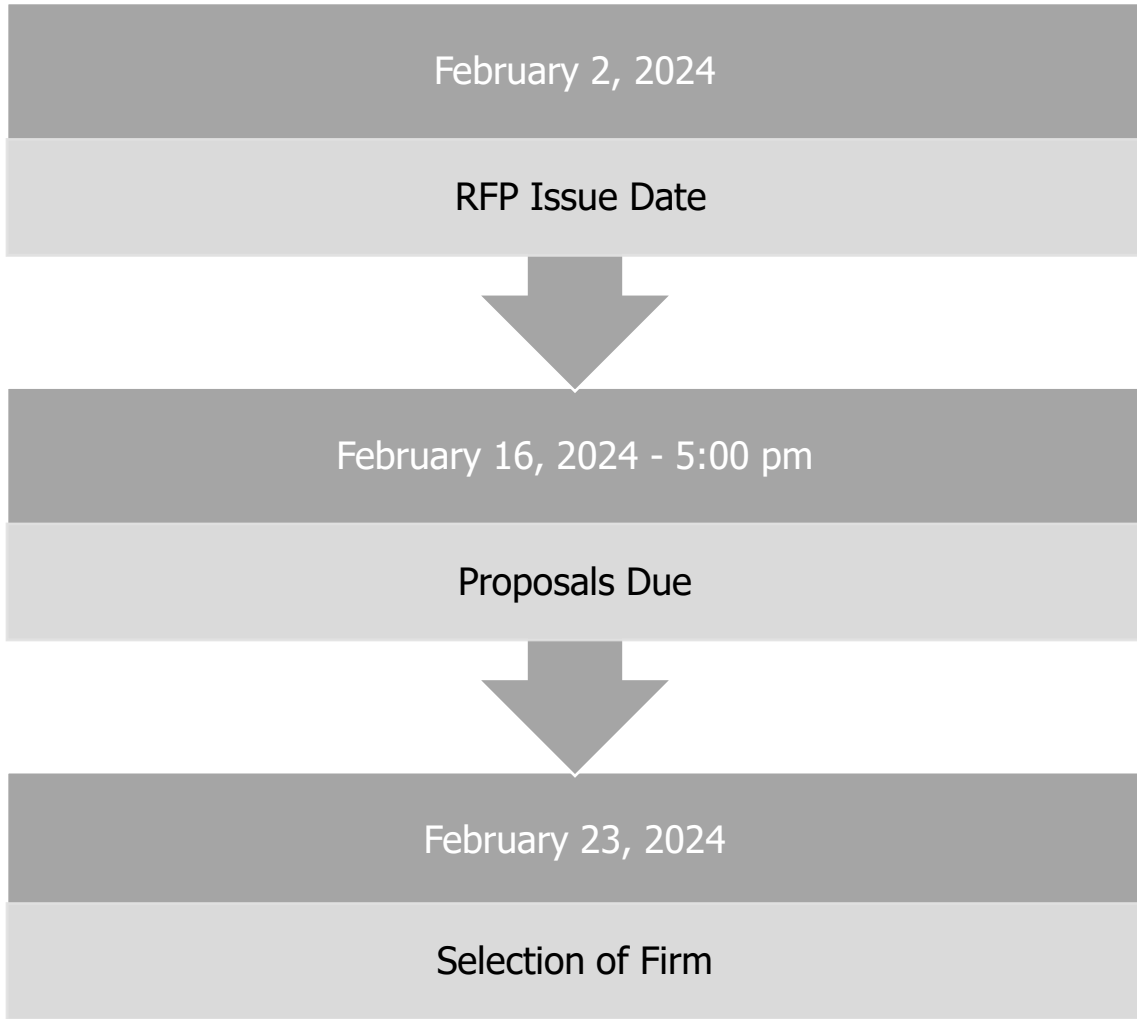
Agency will review Firm's invoice and within ten (10) days of receipt notify Firm in writing if there is a disagreement or dispute. If there are no such disputes, Agency shall pay the invoice amount in full within (30) days of invoice send date.





**TIMELINE:**

Prospective proposers may contact Matt Salazar by email at [msalazar@homesforgood.org](mailto:msalazar@homesforgood.org) for further information regarding this process or to request clarification.





## Evaluation & Selection Criteria

Homes for Good will review the proposals for conformity with the requirements of the Request for proposals described above. Conforming proposals will be evaluated according to the criteria below.

CRITERIA	POSSIBLE POINTS
Qualifications of the Organization	30
References	20
Experience of staff assigned to project	30
Diversity Equity Inclusion approach	10
Fee Proposal	10
<b>TOTAL</b>	<b>100</b>

Homes for Good at its discretion will select the firm that offers the best combination of experience and services that is overall most beneficial to the Agency.