



Request for Proposals
Housing Voucher Processing

Issuance Date: April 2, 2018

Proposals must be submitted no later than 5:00 p.m. (EST) on
April 27, 2018.

Submit to:
MedicaidSubsidy@ohiohome.org

57 E. Main Street | Columbus, OH 43215

TABLE OF CONTENTS

1. Guidelines for Request for Proposals

1.1 Introduction.....	3
1.2 Schedule of Events.....	3
1.3 Submission of Written Questions.....	3
1.4 Verbal Communication Regarding RFP Prohibited.....	4
1.5 Submission of Proposals.....	4
1.6 Right to Request Additional Information.....	4
1.7 Right to Reject Proposals and Cancel RFP.....	4
1.8 Award of RFP.....	4
1.9 Agreement for Services.....	4

2. Scope of Services

2.1 Services Required.....	5
2.2 Other Services.....	6

3. Required Information to Be Provided in Proposal

3.1 Qualifications and Experience of Firm.....	6
3.2 Qualifications and Experience of Key Personnel.....	7
3.3 Firm References.....	7
3.4 Methodology and Approach.....	7
3.5 Cost Proposal.....	7
3.6 Other Qualifications.....	7

4. Evaluation Process

4.1 Minimum Evaluation Requirements.....	7
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5. Preparing and Submitting the Proposal

5.1 Proposal Organization and Format.....	8
5.2 Submitting the Proposal.....	8

Exhibit A: Standard Affirmation and Disclosure Form.....	10
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Section 1 – Guidelines for Request for Proposals

1.1 Introduction

The Ohio Housing Finance Agency (OHFA) is seeking proposals from entities qualified to perform monthly housing voucher processing for OHFA's [811 Project Rental Assistance Program](#) (Ohio 811) and [Ohio Department of Medicaid's Subsidy Demonstration Program](#) (ODMSD). These programs provide the opportunity for individuals who are extremely low-income and living with a disability to live as independently as possible by subsidizing rental housing opportunities and providing access to supportive services through the Ohio Medicaid Plan. Rental assistance covers the difference between 30 percent of the resident's income and the unit's 50 percent AMGI rent level calculated for the Ohio Low-Income Housing Tax Credit program.

Voucher processing services are being sought for the period of June 1, 2018, through May 31, 2020.

1.2 Schedule of Events

OHFA has established the following schedule for selection of the firm:

<u>Event</u>	<u>Date</u>
RFP issuance date	April 2, 2018
Written questions due from respondents	April 13, 2018
OHFA response to written questions	April 20, 2018
Proposals due from respondents	April 27, 2018, 5:00 p.m. (EST)
Internal evaluation of proposals completed	May 4, 2018
Confirmed selection by OHFA Board	May 16, 2018
Agreement for Services executed	May 25, 2018
Start date of services	June 1, 2018

1.3 Submission of Written Questions

It is the policy of OHFA to accept questions and inquiries from all potential respondents. All questions and inquiries shall be in writing; no verbal inquiries will be honored. Potential respondents may submit their questions or inquiries via e-mail to MedicaidSubsidy@ohiohome.org (Subject: Rental Assistance RFP).

All written questions or inquiries are due by 5:00 p.m. (EST) on Friday, April 13, 2018. OHFA expects to respond to all questions and inquiries by 5:00 p.m. (EST) on Friday, April 20, 2018.

OHFA reserves the right to decline to respond to any question or inquiry that will cause an undue burden or expense for OHFA or which OHFA deems unnecessary for purposes of responding to this RFP. OHFA will post all questions or inquiries with answers on its website at <http://www.ohiohome.org>.

1.4 Verbal Communication Regarding RFP Prohibited

Verbal communication from any potential respondent regarding this RFP to OHFA staff and/or OHFA Board members is prohibited throughout the RFP process until the engagement is approved by the OHFA Board.

1.5 Submission of Proposals

One electronic copy of the proposal must be received by 5:00 p.m. (EST) on April 27, 2018. Proposals may be emailed in Adobe PDF format to MedicaidSubsidy@ohiohome.org (Subject: Housing Voucher Processing RFP).

Proposals received after the specified date and time will not be eligible for consideration. Any respondent who wishes to confirm receipt of their proposal may contact OHFA by e-mail at MedicaidSubsidy@ohiohome.org. OHFA will respond by e-mail to confirm the receipt of the proposal.

1.6 Right to Request Additional Information

OHFA reserves the right to request any additional information to assist in the review process, including requiring oral presentations to OHFA staff members, OHFA Evaluation Team and/or Board.

1.7 Right to Reject Proposals and Cancel RFP

OHFA reserves the right to reject any and all proposals at any time. OHFA reserves the right to cancel, withdraw, modify or reissue this RFP at any time for any reason.

In connection with this RFP, OHFA reserves the right to waive any technicalities and make any award(s) that are determined to be in the Agency's best interests.

1.8 Award of RFP

The RFP will be awarded to the firm that OHFA determines will provide the most beneficial combination of qualifications and experience, understanding of the Housing Voucher Processing services needed, assurances and availability of key personnel and reasonableness of fee proposal relative to proposed work. OHFA will post on its website the firm selected to be awarded the contract after formal Board approval on or about May 16, 2018.

1.9 Agreement for Services

The firm selected to provide the services described in this RFP will be expected to complete and submit an agreed upon Agreement for Services covering the scope and terms of this RFP. The Agreement for Services will begin on June 1, 2018, and expire May 31, 2020.

Section 2 – Scope of Services

2.1 Services Required

OHFA is seeking proposals from entities qualified to perform monthly housing voucher processing relating to the Ohio 811 Program and ODMSD Program.

Ohio 811 Program

Rental Assistance Amount:

Rental assistance covers the difference between 30 percent of the resident's income and the unit's 50 percent AMGI rent level calculated for the Housing Tax Credit program. The total rent cannot exceed the fair market rent published by HUD.

HUD Vouchering:

Vendor will receive HUD Form 50059 ("child voucher") and HUD 52670-A Part 2 Special Claims from participating property owners to the vendor's TRACS mailbox from owners' TRACS compliance software, (e.g. Yardi, Bostonpost, OneSite and any other comparable firms or companies, none of which OHFA endorses or recommends). The vendor will verify that all information on the child voucher is correct and build HUD Form 52670 (the "parent voucher"), submitting the parent voucher to HUD contacts and transmitting the voucher through iMAX to TRACS.

Rental Assistance Contract Period:

OHFA and the selected owners of Housing Tax Credit developments will enter into a 20-year Rental Assistance Contract (RAC). The HUD Section 811 PRA funding guarantees the rental assistance program for the first five years. The balance of the contract will be funded based on annual federal appropriations.

Units Projected:

OHFA estimates serving approximately 485 households (an estimated 80-100 properties) throughout the state through the Ohio 811 Program. Projects will be awarded through the 2016, 2017, 2018 and 2019 tax credit application rounds or until grant funds are exhausted.

Required Services:

- Host a TRACS/iMAX mailbox ID to receive HUD Form 50059
- Run validations on HUD Forms 50059
- Roll up child vouchers into monthly parent voucher
- Use of TRACS 202D-compliant software
- Submit parent vouchers to HUD staff and TRACS

ODMSD Program

Rental Assistance Amount:

Rental assistance covers the difference between 30 percent of the resident's income and the unit's 50 percent AMGI rent level calculated for the Housing Tax Credit program. The total rent cannot exceed the fair market rent published by HUD.

ODMSD Vouchering:

Because the ODMSD Program does not utilize TRACS, the vendor will work with OHFA and participating property owners to determine the most appropriate method for voucher creation, transmittal, and verification in accordance with applicable program guidelines. The vendor will then utilize the agreed-upon method to receive, verify, and approve vouchers on a monthly basis. Approved vouchers will be transmitted to OHFA for payment to the property owner.

Rental Subsidy Contract Period:

OHFA and the selected owners of Housing Tax Credit developments will enter into a 15-year contract.

Units Projected:

OHFA estimates serving approximately 30 households throughout the state through the ODMSD Program (an estimated 10-12 properties). Projects will be awarded through the 2016, 2017 and 2018 tax credit application rounds. Projects take approximately two years from the time they are awarded funds to the time they are placed in service. The first projects will be ready for occupancy in summer 2018.

Required Services:

- Determine most appropriate method for voucher creation and processing
- Set-up or integration of system as necessary
- Review, edit and certify information on submitted voucher documentation
- Transmit approved vouchers to OHFA for payment to owner

2.2 Other Services

In addition to the services described in 2.1, the following services may also be requested of the selected firm:

- Ongoing technical assistance, including training, to owners in submitting vouchers and correcting any identified errors
- Ongoing technical assistance, including training, to OHFA in entering new projects into HUD's Secure Systems

Section 3 – Required Information to be provided in Proposal

3.1 Qualifications and Experience of Firm

Please describe your firm's experience providing housing voucher processing services in general and specifically with regards to state level housing agencies. The description of your firm should include, but is not limited to, the following:

- a) Location and size (include both location of headquarters and location of Ohio office, if applicable)
- b) Number of years of operation
- c) Organizational structure

- d) Number of years of experience providing rental assistance payment processing services
- e) List of current clients and length of service
- f) Key factors as outlined in 4.1

3.2 Qualifications and Experience of Key Personnel

Designate the individual(s) who will be assigned to OHFA for this work. Provide a brief description of their relevant experience, expertise and office location.

3.3 Firm References

Provide the names and contact person(s) for at least three state-level housing finance agencies for which your firm has provided housing voucher processing services.

3.4 Methodology and Approach

Describe in detail the efforts your firm will undertake to satisfy each of the requirements of Section 2, Scope of Services. Indicate if any additional tasks are necessary and/or advisable.

3.5 Cost Proposal

Outline the fee schedule for the two-year contract period using the following cost breakdown:

- Start-up Fee (if applicable)
- Annualized Ongoing Maintenance Costs
- Annualized Per Unit or Per Project Costs
- Other Associated Annualized Costs

Assume 485 units for the 811 Program and 30 units for the ODMSD Program.

3.6 Other Qualifications

Provide any other qualifications that should be considered.

Section 4 – Evaluation Process

4.1 Minimum Evaluation Requirements

The OHFA Evaluation Team will evaluate the responses to this RFP. Each proposal will be reviewed to ensure that the respondent has complied with each section of this RFP and followed the formatting, organizational and submission requirements as described in this RFP.

Factors to be considered by the team may include, but are not be limited to, the following:

- Experience with HUD Secure Systems and TRACS
- Experience providing vouchering services for the 811 Program
- Experience working with HUD 811 staff and the Technical Assistance Collaborative
- Experience in providing vouchering services for state or local housing initiatives
- Total units/projects for which vouchering services are currently being provided

- Internal controls/software to determine the validity of child voucher payment requests

Once the firms are ranked on the criteria set forth above, OHFA will review the cost proposals and information that it maintains to determine a reasonable cost for Housing Voucher Processing Services. If the respondent chosen by the evaluation team, based on all other criteria other than cost, has a higher cost proposal than what OHFA determines as a reasonable cost, that respondent will be asked if it can provide the services for an amount OHFA determines to be reasonable. In considering which firm to select, OHFA has the right to negotiate the fee of any respondent that it believes will provide the best services at the most reasonable price that is in the best interests of the Agency. However, OHFA is not obligated to select the respondent with the lowest cost proposal.

OHFA will post on its website the firm selected to be awarded the contract after formal approval on or about May 16, 2018.

Section 5 – Preparing and Submitting the Proposal

5.1 Proposal Organization and Format

OHFA requires the respondent to follow the formatting described below when submitting their proposal:

- a) Proposals must be limited to 15 pages, not including exhibits or appendices; please do not submit brochures, annual reports and other like material not specifically requested.
- b) Proposals will be typed on standard 8.5x11 inch paper, single-spaced with one-inch margins and a 12-point font.
- c) Responses to each question should be presented in order and include the section heading and numbers as assigned in the RFP.
- d) Each response to this RFP should include as the cover page a Letter of Transmittal.
- e) Each response to this RFP should include as the second page a Table of Contents.
- f) Each response to this RFP will include as the third page a completed copy of the Standard Affirmation and Disclosure Form for Contracts (Exhibit A).

5.2 Submitting the Proposal

See Section 1.5 for instructions regarding proposal submission. By submitting a proposal, the respondent agrees to the following:

- a) All materials submitted become the property of OHFA and shall be public information unless a statutory exception exists which would thereby determine that such information cannot be released to the public. If you have information in your proposal that you believe is exempt from the public records laws, you must identify each and every occurrence of the information in the proposal on a separate page titled "Exemptions to the Public Records Law." OHFA reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected.

- b) Respondents are expected to respond to all requirements in this RFP and comply with any terms and conditions outlined in the RFP. Failure to do so may result in disqualification of the proposal.
- c) All costs incurred in preparation of a proposal shall be borne by the respondent. Proposal preparation costs are not recoverable under the agreement for services and/or engagement letter. OHFA shall not contribute in any way to recovering the cost of proposal preparation.
- d) If during the evaluation process it becomes necessary to make further distinctions between certain respondents, OHFA may request certain respondents make oral presentations of proposals to OHFA staff members, an OHFA Evaluation Team and/or Board.
- e) Proposals received after the deadline will not be reviewed. Respondents are advised that there will be no opportunity to correct mistakes or deficiencies in their proposal after the submission deadline. Proposals that are missing required forms and/or information may not be evaluated. It is the sole responsibility of the respondent to ensure its proposal is complete, accurate, responsive to the requirements and received on time. Proposals not complying with the requirements of the RFP may not be reviewed.
- f) Proposals received prior to the due date shall remain sealed until the posted date.

EXHIBIT A

STANDARD AFFIRMATION AND DISCLOSURE FORM EXECUTIVE ORDER 2011-12K

July 2011

Governing the Expenditure of Public Funds on Offshore
Services

AFFIRMATION AND DISCLOSURE:

By the signature affixed to this response, the Bidder/Offeror/Contractor affirms, understands and will abide by the requirements of Executive Order 2011-12K issued by Ohio Governor John Kasich. If awarded a contract, the Bidder/Offeror becomes the Contractor and affirms that both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States. The Executive Order is attached and is available at the following website: <http://www.governor.ohio.gov/Portals/0/pdf/executiveOrders/EO%202011-12K.pdf>

The Bidder/Offeror/Contractor shall provide all the name(s) and location(s) where services under this Contract will be performed in the spaces provided below or by attachment. Failure to provide this information as part of the response will deem the Bidder/Offeror not responsive and no further consideration will be given to the response. Bidder/Offeror's offering will not be considered. If the Bidder/Offeror will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

1. Principal location of business of Contractor:

(Address)

(City, State, Zip)

Name/Principal location of business of subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

2. Location where services will be performed by Contractor:

(Address)

(City, State, Zip)

Name/Location where services will be performed by subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:

(Address)

(Address, City, State, Zip)

Name/Location(s) where state data will be stored, accessed, tested, maintained or backed-up by subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

4. Location where services to be performed will be changed or shifted by Contractor:

(Address)

(Address, City, State, Zip)

Name/Location(s) where services will be changed or shifted to be performed by subcontractor(s):

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

(Name)

(Address, City, State, Zip)

Bidder/Offeror/Contractor:

Entity Name

By: _____
Authorized Representative

Printed Name

Date: _____