

PROPOSAL PACKAGE

**CHARLESTON COUNTY HOUSING
& REDEVELOPMENT AUTHORITY
2106 MT PLEASANT STREET, CHARLESTON, SC 29403**

REQUEST FOR PROPOSALS

FOR



Fee Accounting Services

**CCHRA # 17-0301
PROPOSAL DUE DATE**

July 5, 2017

**PURCHASING DEPARTMENT
MARK STRICKLAND, PROCUREMENT ADMINISTRATOR
Phone: (843) 628-6235**

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RFP Fee Accounting Services

CCHRA# 17-0301

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REQUEST FOR PROPOSALS

Fee Accounting Services

Job Number: 17-0301

Charleston County Housing & Redevelopment Authority (CCHRA) will receive Proposals for **Fee Accounting Services**. Proposals will be accepted until 4:00 p.m. local time on July 5, 2017 at Charleston County Housing & Redevelopment Authority, 2106 Mt Pleasant Street, Charleston South Carolina 29403. Late proposals will be rejected as not meeting the requirements of this Request for Proposals. Inquiries may be directed to Mark Strickland by phone (843) 628-6235 or email mstrickland@cchra.net

The following evaluation factors will be used to evaluate the RFP:

1. Knowledge of HUD regulations, requirements and accounting practices as well as applicable Federal, State and Local laws (30%);
2. Prior experience providing fee accounting services to Public Housing Authorities of similar size and program composition as CCHRA (25%);
3. Price/Cost Proposal (20%);
4. Knowledge and experience on the public housing software (10%);
5. References (10%);
6. Availability of the principal fee accountant(s) for on-site consultation including attendance of regular Board Meetings when needed (5%).

In accordance with federal law contracts for work under this proposal will obligate the contractor and subcontractors not to discriminate in employment practices as mandated by the Davis-Bacon Act and Section 3 of the Housing and Urban Development Act of 1968. Minority and women owned businesses are encouraged to respond.

The Housing Authority reserves the right to wave irregularities and to reject any and all proposals, or to re-advertise for proposals.

Description of Entity

Requester's Address and Recipient of Proposals

The requester is:

Procurement Administrator
Charleston County Housing & Redevelopment Authority
2106 Mt Pleasant Street
Charleston, SC 29403

Questions concerning the proposal should be directed to:

Mark Strickland, Procurement Administrator
Charleston County Housing & Redevelopment Authority
2106 Mt Pleasant Street
Charleston, SC 29403
(843) 628-6235
Email: mstrickland@cchra.net

The primary goal of the Housing Authority is to provide decent, safe, and sanitary housing for families that cannot afford standard private housing. The Housing Authority's programs are administered at the local level, in accordance with state law.

Section I. Intent

The intent of this Request for Proposal is to enter into a maximum three (3) year, firm fixed-price, requirements based agreement, which will be structured as a one year agreement with the option, at Charleston County Housing & Redevelopment Authority's discretion, of 2 additional one-year options periods, with a one or more qualified firms to provide the variety of fee accountant services required by Charleston County Housing & Redevelopment Authority (CCHRA).

Section II. Scope of Work Desired

The proposal must clearly state which issues are covered and which are not covered. CCHRA will issue one contract for all services requested. The contract will be fixed firm price, requirement based with no guarantee of a minimum amount of services to be provided. The scope of services will include, but may not be limited to the following:

1. Review year end work papers, prepared by the HA staff, for adjusted balances and adequate supporting detail for values included in the general ledger.
2. Prepare update of current year depreciation records and fixed asset additions, compute annual depreciation, and provide adjusting entries to HA staff to record on year end general ledgers.
3. Review activity in the Capital Fund program grants and ensure that activity is properly recorded on the General Ledgers at year end.
4. Review activity in the Housing Choice Voucher ledgers to ensure the accuracy of all HA grants and other revenue, and all program expenses. Determine updated year end Net Asset position of Administrative and HAP reserves, and adjust accordingly. Ensure that earned Admin fees are properly recorded, and enter any provision for unsettled fees due to or from HUD.
5. Ensure that VMS reports for the audit period are properly adjusted in the HUD Secure Systems VMS program area, provide necessary adjustments or corrections to HA staff to properly record annual HAP expense and Admin expense.
6. Prepare the year end Pilot expense and liability adjusting entries after all other year end adjustments have been recorded on the General Ledgers for the Public Housing Program.
7. Input the year end adjusted data into the HUD PHAS template for the Housing Authority. Prepare the complete FDS submission prior to the HUD reporting deadlines and submit same to HUD.
8. Provide all related adjusting journal entries to the HA staff to be recorded on the general ledgers.

9. Provide limited technical consulting assistance to the Housing Authority as necessary.
10. Work collaboratively with the Housing Authority staff, and with staff of the Housing Authority's Independent CPA firm during their engagement, to perform the annual financial statement and program compliance audit.

Section III. Special Instructions to Offerors for this Proposal

This section describes the form and/or content of the Offerors proposals when they respond to this RFP. Offerors are asked to restrict their proposal to fifty (50) pages. This applies to the proposal itself; attachments such as resumes are not included in this proposal length restriction. Section II. Scope of Services work shall be firm fixed price per task or hourly and shall be submitted as an attachment to the CCHRA Offeror Information Price form included in this RFP Document.

Respondents are asked to provide proposals that clearly state on the outside of the package:

PROCUREMENT DOCUMENT**Name of Firm:****Proposal for Fee Accountant Services****Job# 17-0301****Due: July 5, 2017 4:00 p.m. EST**

Proposals must include a full description of all proposed services. If the Respondent is not proposing to provide all services as listed under the Scope of Services requested in this RFP, please be very specific as to which services are included and which are excluded. All assumptions concerning Charleston County Housing & Redevelopment Authority's (CCHRA's) involvement should be clearly stated. All exceptions to the RFP should be noted in the cover letter. Unique services should be clearly defined. The assumption should be made by all Respondents that their original Proposal will be their only opportunity to present their services and qualifications, and therefore should be as comprehensive as possible within the proposal length restrictions. It is the PHA's intent to make this RFP part of the contract for services.

The Respondent shall provide one (1) original and two (2) bound copies to:

Mark Strickland, Procurement Administrator
Charleston County Housing & Redevelopment Authority
2106 Mt. Pleasant Street
Charleston, SC 29403

Proposal Preparation Outline

Respondent's standard proposal formats are acceptable, provided the following information is included:

1. Company Profile

- A. The firm name and business address.
- B. A brief synopsis of the general capabilities and strengths of the firm.
- C. A brief overview of the firm's history, including the number of years in business, ownership structure, previous name of business, if any.
- D. List and describe any joint venture, teaming, subcontracting arrangement, or involvement of other firms in the proposed work.
- E. List of current litigation, outstanding judgments and liens. Submit a list of and describe any lawsuits filed against the firm during the preceding five (5) years in conjunction with the type of services requested herein.
- F. Any additional information regarding your firm's experience and capabilities that you feel would be important to the success of our projects.
- G. Submit documentation on the firm's professional liability insurance and disclose any applicable deductible amount.
- H. Include five (5) references, including contact person, company name, phone number, and address on similar services contracts.

2. Organization, Support and Experience

- A. Organization chart and assignment of responsibilities for key staff.
- B. Key personnel listing, by labor category, location of staff, and resumes.
- C. Resumes for all staff proposed for providing services under this contract.
- D. Detailed statement of background/experience of firm in providing similar services for Public Housing Authority clients.
- E. Provide a complete firm employment profile on the form enclosed herein.
- F. Provide a statement describing the firm's present and projected workload, staffing and ability to provide prompt quality accounting services.
- G. Without breaching client confidentiality, provide a statement indicating whether any clients are currently involved or anticipate being involved in litigation with any CCHRA Board or staff members.
- H. Without breaching client confidentiality, provide a description of any existing, potential or probable conflict of interest, which exists or that may arise for the firm during the agreement period.

3. Technical Proposal

- A. Offeror approach – a detailed narrative of the firm(s) approach to providing the required services.
- B. Explain the firm’s understanding of CCHRA’s purpose and scope of this project.
- C. Provide a detailed explanation of cost saving measures to be taken to ensure cost efficiencies for CCHRA.

4. Price/Cost Proposal

- A. Provide the firm’s suggested methods and amounts of compensation. Include the hourly billing rate for all personnel that will provide services during the agreement term.
- B. Each proposal shall contain a statement of the minimum compensation for which the firm is willing to render services to CCHRA, including the amounts and/or methods of calculation. CCHRA is interested in proposals that will provide top quality service at competitive rates.
- C. Each proposal should offer at least two methods of determining fees for services rendered: 1) based on hourly rates and 2) fixed firm price per service. Other methods or variations in determining compensation are encouraged and will be considered. The PHA reserves the right, without qualification, to negotiate a fee structure with the selected firm.
- D. Include in the price proposal the smallest fraction hour delineation for billing (1/12, 1/6, 1/4, 1/2, etc.); retainer requirements, list all reimbursable expenses and charges for copies, telephone, fax and automobile mileage.
- E. Compensation that is based on hourly rates shall be billed monthly by property, grant or program and shall be based only on actual time spent, without multipliers, add-ons, “unit billing” or other variations that could or would result in payment for more than actual time spent.

5. Forms- CCHRA & HUD Notices and Forms

THE FOLLOWING NOTICES ARE PROVIDED FOR YOUR INFORMATION AND DO NOT NEED TO BE RETURNED WITH YOUR PROPOSAL:

- ◆ NOTICE EMPLOYEE RIGHTS ON GOVERNMENT CONTRACTS
- ◆ NOTICE SECTION 3 CLAUSE
- ◆ NOTICE HUD 4010 FEDERAL LABOR STANDARDS PROVISIONS

THE FOLLOWING FORMS **MUST** BE COMPLETED AND SUBMITTED WITH THE PROPOSAL DOCUMENTS. FAILURE TO COMPLETE AND SUBMIT ALL OF THE FORMS **MAY** RENDER THE PROPOSAL NON-RESPONSIVE AND SUBJECT TO DISQUALIFICATION

- ◆ FORM CCHRA OFFERORS INFORMATION
- ◆ FORM CCHRA SECTION 3 BUSINESS SELF-CERTIFICATION
- ◆ FORM CCHRA SECTION 3 COMPLIANCE REPORT
- ◆ FORM CCHRA SECTION 3 COMPLIANCE AFFIDAVIT
- ◆ FORM CCHRA NON-COLLUSIVE AFFIDAVIT
- ◆ FORM CCHRA CRIMINAL ACTIVITY CERTIFICATION
- ◆ FORM CCHRA SENSITIVE INFORMATION POLICY
- ◆ FORM ILLEGAL IMMIGRATION REFORM ACT PROCUREMENT CERTIFICATION

- ◆ FORM HUD 5369-A CERTIFICATIONS & REPRESENTATION OF BIDDERS
- ◆ FORM HUD 5369-B INSTRUCTIONS TO OFFERORS NON CONSTRUCTION
- ◆ FORM HUD 5369-C, Certifications and Representations of Offerors
- ◆ FORM HUD 5370-C I GENERAL CONDITIONS NON-CONSTRUCTION
- ◆ FORM W-9 REQUEST FOR TAXPAYER IDENTIFICATION NUMBER
- ◆ HUD-CONTRACT PROVISIONS 51915
- ◆ HUD-CONTRACT PROVISIONS 51915-A (9/98)
- ◆ HUD- PREVIOUS PARTICIPATION CERTIFICATION 2530 (7/2009)

Each of these forms **MUST** be completed and submitted with the Proposal. This list does not include other submittals that may be required (i.e. Product Data Sheets, Unit Prices, etc.) **Read the RFP documents fully and in great detail.** This checklist is only intended to aid potential Respondents in the preparation of their Proposals.

Section IV. Evaluation Process & Factors

The following procedures will be followed for the evaluation of Proposals:

- All proposals will be evaluated individually on the qualifications and experience of the respondent prior to examining price. The evaluation will consist of a qualitative review of the proposal to determine how it meets the minimum requirements.
- Upon completion of the proposal evaluations for all respondents, the price proposals will be analyzed.
- PHA reserves the right to make award based solely on the proposals or to negotiate with one or more respondents.
- The proposals, which have a reasonable chance of being selected for award, will be considered in the "Competitive Range".
- CCHRA **may** request that respondents whose proposals are in the competitive range make oral presentations concerning their proposals to a CCHRA Evaluation Committee. A CCHRA representative will schedule the presentations (if necessary) on an individual basis.
- At the conclusion of negotiations, respondents **may** be given an opportunity to submit best and final offers before final determination.
- The contract for services will be awarded to the responsible respondent whose proposal is most advantageous to PHA with price and other factors considered. **Award will not necessarily be made to the respondent offering the lowest price.**
- PHA reserves the right to reject any or all proposals, or to re-advertise for proposals.

Technical Evaluation Criteria

The below listed factors will be used to evaluate each proposal. The highest ranking proposal will be considered to be the best qualified.

FACTORS	MAXIMUM VALUE
Knowledge of HUD regulations, requirements and accounting practices as well as applicable Federal, State and Local laws	30
Prior experience providing fee accounting services to Public Housing Authorities of similar size and program composition as CCHRA	25
Price/Cost Proposal	20
Knowledge and experience on the public housing software	10
References	10
Availability of the principal fee accountant(s) for on-site consultation including attendance of regular Board Meetings when needed	5
TOTAL	100

Section V. GENERAL & SUPPLEMENTARY CONDITIONS

1. Offeror Inquiries and Responses

All inquiries to this RFP must be submitted in writing to:

Charleston County Housing & Redevelopment Authority
Attn: Procurement Administrator
2106 Mt. Pleasant St.
Charleston, SC 29403
Email: mstrickland@cchra.net

Inquiries must make reference to specific section numbers of this RFP and, where appropriate, paragraph numbers. Offeror questions and the answers to these questions will be communicated to all potential Offerors. The Authority must receive all inquiries by the date listed in the timetable.

2. Prior Information

Any information, which may have been released either verbally or in writing prior to the issuance of this RFP, will be disregarded.

3. Conformity with this RFP

The Offeror's proposal must provide a simple, straightforward presentation of its capability to satisfy the requirements of this RFP. The proposal must follow the format defined in Section 3 of this RFP. Proposals must be signed and received in completed form at CCHRA no later than the date and time specified in Section 3 of this RFP. Proposals received prior to the time of the deadline will be date and time stamped and securely kept, unopened. No proposal received after the Deadline for Proposals date and time will be accepted. The only exceptions are as outlined in Form HUD-5369-B, Section 6 (a).

Unless specifically authorized, telegraphic proposals will not be considered. However, telegraphic modification of proposals will be considered, if received prior to the hour set for the submittal deadline and if written confirmation of such modification over the signature of the Offeror is placed in the mail and postmarked prior to the time set for proposal to be due. Offerors are cautioned that, while telegraphic modifications of proposals may be received as provided above, such modifications, if not explicit, and if in any sense subject to misinterpretation, shall make the proposal so modified or amended subject to rejection.

4. Cost Detail

Offerors should take care to include in their proposal all services referenced in their proposal. If fixed firm price is required, price offered shall be inclusive of all expenses, travel, lodging, overhead and profit.

5. Cost Guarantee

The Offeror must honor all prices quoted in its proposal for sixty days (60) days.

6. Withdrawal of Proposals

The Offeror may withdraw its proposals by written or telegraphic request dispatched by the Offeror in time for delivery in the normal course of business prior to Deadline for Proposals date and time, provided that a signed written confirmation of any telegraphic withdrawal is placed in the mail and postmarked prior to that time. Negligence on the part of the Offeror in preparing its proposal confers no right of withdrawal or modification of its proposal after such proposal has been opened.

7. Acceptance of Proposals

The Authority reserves the right to accept or reject any or all proposals, or to waive any informalities. The Authority reserves the right to reject the proposal of any Offeror who has previously failed to perform properly, or to complete on time, a contract of a similar nature; who is not in a position to perform the contract; or who habitually and without just cause neglected the payment of bills or otherwise disregarded its obligations to subcontractors or employees.

If the Authority finds significant errors in the Offeror's proposal, or if the Offeror fails to conform to the essential requirements of the RFP, the Authority will reject the proposal. When an Offeror's proposal varies from what the RFP requested, the Authority and the Authority alone will determine whether the variance is significant enough to reject the proposal.

8. Exceptions to the RFP

The Offeror must clearly identify and explain any exceptions to the RFP, including the advantages and disadvantages to the Authority resulting from the exceptions.

9. Award of Contract

The Contract shall be awarded to the Offeror submitting the most responsible proposal, price and other factors considered, complying with the specifications contained herein, provided the proposal is in the best interest of the Authority to accept. The Authority is therefore not bound to accept a proposal on the basis of lowest quoted price alone. The Offeror to whom the award is made will be notified at the earliest practical date. Offerors who desire to receive a copy of the Statement of Award must include a self-addressed stamped envelope.

10. Contract and Contract Execution

A Charleston County Housing & Redevelopment Authority standard consultant agreement will be issued. Subsequent to the award, and within ten (10) days after the prescribed forms are presented to them for signature, the successful Offeror shall execute and deliver to the Authority the signed agreement. The proposal and Request for Proposal and any written correspondence will become part of the Contract and shall be incorporated therein by reference.

11. Affirmative Action

All Offerors submitting a proposal must submit a work force profile for women and minorities.

12. Proposal Preparation Costs

The Offeror shall wholly absorb all costs incurred in the preparation and presentation of the proposal. All supporting documentation and manuals submitted with this proposal will become the property of the Authority.

13. Proof of Insurance

The Offeror shall submit as part of its offer written evidence that it maintains:

Workers Compensation (statutory)
Comprehensive General Liability
Auto Liability (including owned, hired or used)
Professional Liability

Said insurance shall be written by an insurer holding a current certificate of authority pursuant to South Carolina Statutes. The certificate shall provide that no material alteration or cancellation, including expiration and non-renewal, shall be effective until fifteen (15) days after receipt of written notice by the PHA.

14. Appeals and Remedies

It is CCHRA's policy to handle disputes promptly at the CCHRA level. CCHRA's Appeals and Remedies procedure is listed in CCHRA's Procurement Policy Section 15. Any protest resolution will follow procedures in CCHRA's Policy Section 15 and will be in compliance with 24 CFR 85.36(b)(12) and HUD Handbook 7460.8 REV-1.

15. Third Party Claims

The Authority shall be held harmless from any third party legal claims. The PHA will contract only with the Consultant. Any sub-contractor employed by the Contractor will be the responsibility of the Contractor.