



**El Paso Housing Operations and
Management Enterprises, PFC
d/b/a EP Home**

**Request for Proposals for
Property Management Services
For Residential Units**

Solicitation No. PM 19-R-0001

**Responses due on July 26, 2019 at 3:00 p.m.
(Mountain time)**

EP Home Gerald Cichon Chief Executive Officer	An Equal Opportunity Employer and Contracting Agency
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Point of Contact for this RFP (Direct All Inquiries or Requests to)	Juan Pulido Procurement Manager 5300 E. Paisano Dr., El Paso, Texas 79905 Tel: 915.849.3695 Fax: 915.849.3868 Email: jpulido@hacep.org
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I. Introduction and Background Information

A. Overview of the RFP. EP Housing Operations and Management Enterprises d/b/a EP HOME PFC (“*EP Home*”) is a residential property management company that currently manages approximately 8,600 residential housing units in El Paso, Texas. EP Home’s portfolio includes federally-subsidized affordable housing, low-income tax credit housing, and a small number of market rate units. EP Home is seeking an experienced property management company or companies to step in and act as a subcontractor(s) to EP Home performing the apartment-level property management and maintenance functions for the entire portfolio. The selected subcontractor(s) will also be expected to assist EP Home with accounting, reporting, compliance, computer integration, and other functions in support of EP Home’s property management obligations to the owners of the portfolio. This procurement is planned for expedited processing. EP Home’s goal is to select and contract with a subcontractor(s) by October 1, 2019 and have the subcontractor(s) transition into its/their role over a three-month period, with a “go live” target of January 1, 2020. The selected subcontractor(s) will be required to have a physical presence in El Paso for at least three months before the “go live” transition date and, thereafter, during the term of property management services provided.

In the El Paso community, EP Home oversees a portfolio with the largest mix of apartments with various different affordable housing programs. Therefore, this RFP contemplates an award to a subcontractor(s) that will be able to provide appropriate oversight, including management-level staff. The transition will be facilitated by the fact EP Home already has fully equipped on-site property management offices at the residential complexes to be served. Furthermore, EP Home welcomes and encourages the selected subcontractor(s) to hire as many of EP Home’s current property management, property accountant, maintenance, and support staff as the selected contractor(s) desire. There is an opportunity to negotiate temporary office space in EP Home’s or its affiliates’ portfolios.

Any contract awarded may require or be contingent upon approval by investor/lenders along with EP Home’s Board of Directors (and/or EP Home’s affiliates’ approval, including HACEP). The contract is anticipated to be for an initial term of two (2) years with three one (1) year renewals, for a maximum total of five (5) years duration.

B. Corporate Organization of EP Home and HACEP. EP Home is organized as a nonprofit public facility corporation under Texas Local Government Code Chapter 303 that supports the mission of its sole sponsor, the Housing Authority of the City of El Paso (“*HACEP*”). The approximate 8,600 units managed by EP Home represent most of HACEP’s overall residential portfolio.

HACEP is a Texas municipal housing authority established and operating pursuant to Texas Local Government Code Chapter 392. HACEP’s mission is to finance, develop, construct, manage, operate, and oversee affordable residential housing properties located in El Paso County, Texas. HACEP is governed by a five-member Board of Commissioners who are appointed by the Mayor of the City of El Paso, Texas to serve in the role of commissioners for HACEP. HACEP has a Chief Executive Officer (“*CEO*”), Gerald Cichon, who has been

appointed to serve as the chief executive overseeing the daily operations and finances of HACEP. In addition to Mr. Cichon, the management team of HACEP includes Executive Vice President/Chief Financial Officer, Satish Bhaskar, as well as other executive employees who are responsible for carrying out the functions and operations of the organization. HACEP is in the process of re-branding itself as “**HOME**”, a transition expected to be completed in 2020 or thereafter. EP Home has the same Board of Directors as HACEP, the same executive management team and is housed at the same office as HACEP.

HACEP has organized stand-alone companies to support its mission, referred to herein as “*Affiliates*.” The board of directors of each of the Affiliates is the same as the five members appointed to serve on HACEP’s Board of Commissioners. HACEP and the Affiliates are governmental entities (public-sector organizations) under Texas law. By analogy to the private sector, HACEP is effectively the “*parent company*” and the Affiliates are akin to “*wholly-owned subsidiaries*.” While EP Home is issuing this procurement and will be contracting with the selected subcontractor(s), HACEP and the Affiliates will be designated third-party beneficiaries who may utilize the services of the selected subcontractor(s). For purposes of full disclosure, the Affiliates joining EP Home and HACEP in this RFP seeking property management services include Paisano Housing Redevelopment Corporation, a nonprofit 501(c)(3) development company, and Affordable Housing Acquisitions, Inc., a nonprofit property-holding company.

C. HACEP’s “RAD” Conversion: A Portfolio-Wide Exit from Public Housing to New Affordable Housing Programs. HACEP is a recognized leader in the national public housing industry. In 2013, HACEP embarked on a unique and bold mission to convert its entire public housing portfolio, consisting of over 40 separate apartment complexes and 6,200 units, into modern affordable housing. This conversion is occurring as part of the federal Rental Assistance Demonstration Project (“**RAD**”), a program introduced by HUD that authorizes and enables public housing authorities to take complete ownership of and rehabilitate public housing units. As of the date of this RFP, the RAD conversion is almost complete. HACEP has completed the conversion of the majority of its 6,200 units of public housing. The conversion includes newly constructed or totally rehabilitated apartments utilizing a mix of low-income housing tax credits (“**LIHTC**”), bonds, private equity, loans, and other public sources of financing. As units are converted in RAD, they are transformed not only physically but also programmatically from traditional public housing (Section 9 of the Federal Housing Act) to voucher-based housing (Section 8). By early 2020, the RAD conversion will be complete and HACEP will have almost none (i.e., a minimal number of) public housing units in its portfolio.

The ongoing final stages of the portfolio-wide conversion, however, adds a unique element to this RFP. HACEP anticipates approximately 1,000-plus units to be converting from traditional public housing (Section 9) to voucher-based housing (Section 8) such as PBRA and PBV during the later portions of 2019 and into 2020. The conversion process involves resident relocations (move-outs and move-ins), residents having the right to return to their “home community” (called the “right of return”), lease-ups into new programs, generally including both federal vouchers and low-income housing tax credits, construction activities at sites being converted, and specialized development accounting. This process will necessarily involve resident paperwork that complies with the new programs for the

affected properties. HACEP intends to transfer the management of these units to the subcontractor prior to stabilizing these converting units. However, HACEP and the Affiliates will manage the array of technical RAD conversion, resident relocation, financial, and construction management supervision of the units undergoing the conversion. Even though HACEP will continue to manage these “RAD functions”, there may be an added level of complexity and compliance obligation with regard to the services to be performed by the selected subcontractor(s) during or immediately following this transitional phase. While HACEP and EP Home are in the process of working through this unique conversion process in the properties that have undergone the RAD conversion, and will continue to manage and oversee the conversion process moving forward, interested proposers need to be mindful of this nuance when pricing and making any proposal in response to this RFP. The converting units described in this paragraph are planned to be included in the transition to the property management subcontractor(s), to occur in the period of time commencing on January 1, 2020 (and, only if absolutely necessary, throughout the early portion of the 2020 calendar year), with the goal of placing these units into the management responsibility of the subcontractor(s) as soon as feasible.

D. Full-Service Property Management. EP Home is seeking to contract with one or more subcontractors to serve as full-service third-party property managers for the entire 8,600-unit residential portfolio. More particularly, EP Home plans to assign the “nuts and bolts” of all property management functions to the selected subcontractor(s), while EP Home remains involved at the highest levels to monitor and oversee the selected subcontractor(s). EP Home desires the services of a subcontractor(s) who can immediately and seamlessly step into this role and lead the way to provide excellent property management services to the residents.

The property management subcontractor(s) will provide three general areas of services: (1) residential apartment management services; (2) residential apartment maintenance services; and (3) interim services assisting with the RAD transition activities that continue during 2020, and possibly beyond for a limited period of time.

(1) The property management services will include implementation and utilization of Yardi or equivalent ERP system to manage and track property management operations and reporting. In addition, due to the unique mix of financing for this portfolio, the property management contractor will be responsible to directly assist EP Home with compliance with legal, regulatory, and investor requirements. Note that some of the current non-Public Housing properties are or will be in the process of negotiating for new loans, re-financing loan terms or being considered for 15 Year Right of Refusal with the contemplation of premises rehab/upgrades. The Owner(s) of the properties will direct and perform these financial transactions (under Asset Management – See Functions to be Retained by EP Home or its Affiliates) with input regarding the capital needs provided by EP Home and the selected subcontractor(s).

(2) The maintenance services will encompass the usual range of maintenance services for apartments: (a) maintaining the buildings and units, (b) repairing the buildings and units, (c) groundskeeping.

(3) The RAD transitional services will include: (a) assisting with resident move-outs, relocations and returns, (b) leasing up residents to new programs, (c) assisting EP HOME to achieve stabilization in the newly renovated or constructed RAD units, and (d) ensuring compliance with the new mix of federal, tax-credit, and investor requirements.

E. Residents: Occupancy and Wait List. The vast majority of the portfolio has a high occupancy rate for completed and stabilized properties (95%-plus) and existing site-based wait lists for each individual property. The wait lists provide a stable pool of ready, willing, and available residents to move-in and occupy new units that come on line. The subcontractor(s) will have access to the existing wait lists for future lease-up purposes. At least initially, the subcontractor(s) will be required to use the existing wait lists.

F. Key RFP Dates and Deadlines. The key dates and deadlines for this RFP are:

Event	Date/Time (Mountain Time)
Release of RFP/Outreach Commencement	Wednesday June 5, 2019
First Advertisement of RFP	Wednesday, June 5, 2019 at 10:00 a.m.
Second and Third Advertisement of RFP	Sunday, June 9 and 16, 2019
Bidders' Conference (Live or Telephone)	Friday June 21, 2019 at 2:00 p.m. (Mountain time)
Opportunity for Tour of Portfolio	June 21st to July 12th, 2019 (by appointment)
Deadline to Submit Question	July 5th, 2019 at 5:00 p.m. (Mountain Time)
Submission Deadline/Closing Date	Friday July 26th, 2019 at 3:00 p.m. (Mountain Time)
Evaluation Period/Interviews with Finalists	July 26th through August 16th, 2019
Award(s)	Wednesday, August 28, 2019
Negotiations with Selected Proposer(s)	August 29th to September 6th 2019
Contract Executed	Friday, September 13, 2019 or TBA
Transition Period	October 1, 2019 to December 31, 2019
Target for Commencement of Services	January 1, 2020

Please note that the point of contact for this RFP, and any inquiries or requests for information, should be submitted only to:

Juan Pulido
Procurement Manager
5300 E. Paisano Dr., El Paso, Texas 79905
Tel: 915.849.3695 Fax: 915.849.3868
Email: jpulido@hacep.org

II. Services Sought/Scope of Work

A. Residential Full-Service Property Management Services. EP Home is currently performing all aspects of the property management for the portfolio. EP Home is seeking a full-service property management company to act as a subcontractor to take the lead in performing traditional property management services. **EP Home will continue to be the Managing Agent. This RFP is to retain one or more subcontractors reporting to EP Home.**

1. Functions to be Retained by EP Home or related Affiliates. Following the award to a subcontractor(s), EP Home will continue to be responsible for four main functions: (a) asset management (i.e., executive-level oversight), (b) audit/compliance reviews, (c) resident care/resident relations (providing resident services, outreach, social services), and (d) public safety (i.e., security, off-duty police patrols). EP Home will hire and direct the outside auditors and accounting firms that serve the portfolio, a function presently performed by Novogradac & Co., LLP. The cost for the audit/compliance, resident care/resident relations and public safety are provided for in the property budgets.

2. Property Management Services Performed by Subcontractor. The subcontractor(s) will provide property management services for the portfolio of residential properties referenced in Appendix A hereto. The residential property management services will include three general components: (1) Property Management Services, (2) Property Management Support Services, and (3) Compliance Support Services as further explained below:

Property Management Services	Property Management Support Services	Compliance with Legal, Regulatory, and Contractual Obligations
<ul style="list-style-type: none"> • Lease-up of new residents • Timely move-ins and move-outs • Conduct annual re-certifications • Determining eligibility to participate in affordable-housing program • Collecting rent and security deposits • Conducting income and rent re-certifications • Ensuring properties are well maintained through regular inspections • Overseeing and coordinating with property maintenance staff • Identifying and addressing emergency situations • Providing excellent customer service to residents • Responding to resident complaints and concerns • Enforcing lease terms, up to and including processing lease terminations/evictions for residents who do not pay or violate the terms of their lease • Submit monthly subsidy requisitions 	<ul style="list-style-type: none"> • Implementing and utilizing ERP computer system such as Yardi to monitor, operate, manage, and track portfolio performance; • Developing budgets and reports related to property management • Compiling and maintaining operational and financial tracking and reports • Communicating with HACEP management on an ongoing basis • Resident services coordination and serve as liaison with resident associations 	<ul style="list-style-type: none"> • HUD Multifamily Compliance, including processing resident certification documents, resident notices, voucher reconciliations, compliance document review, income reporting, reporting; liaison with HUD • LIHTC Compliance as required by federal and Texas law; liaison with TDHCA • Annual rent and annual utility allowance calculations • Compliance with other legal, regulatory, and/or investor requirements for RAD-converted PBRA and PBV Units, LITHC units, Section 202, HOME programs • In conjunction with EPHOME Asset Management team assist in MORs, REAC and TDHCA inspections • Reporting monthly Metrics/report to EPHOME Asset Management team by 5th of each month • UCPS Inspections • CMTS

Additional information about the property management services are listed on [Appendix B](#).

B. Residential Property Maintenance Services Performed by Subcontractor. EP Home currently employs a large number of maintenance staff members, most of whom are located at or near the site of each property (or a group of adjacent properties). However, EP Home will not retain any maintenance functions. Therefore, the selected subcontractor(s) will take over this function and have use of the existing on-site maintenance facilities and an opportunity to hire the current property maintenance staff, which is encouraged. The residential property maintenance services being sought by this RFP are as follows:

Maintenance Services	Maintenance Support Services
<ul style="list-style-type: none"> • Emergency Maintenance • Roofing • Windows and Doors • Plumbing • Painting • Flooring, Countertops, and Built-in-Storage • Electrical • Heating and Air Conditioner Systems -Repair and Maintenance • Energy Conservation and Weatherization • Make-Ready Services (Vacancy Turnarounds) • General Preventative Maintenance • Safety Equipment Inspection and Repairs • Grounds/Landscaping • Elevator Maintenance • Other/Miscellaneous Services 	<ul style="list-style-type: none"> • Maintenance and Capital Planning • Maintenance Policy Compliance • Resident Relations and Satisfaction • Electronic Maintenance Tracking and Reporting • Maintenance-Related Budgeting • Communications with HACEP • Maintenance Procurement Advisory Role

Additional information about the property maintenance services are listed on [Appendix C](#). All major equipment should have a routine maintenance contract.

C. RAD Transitional Services Performed by Subcontractor. As noted above, HACEP is in the final stages of a portfolio-wide conversion of its public housing properties. This conversion allows HACEP to take full ownership of the properties and then either construct brand new units or complete a total rehabilitation (i.e., “gut rehab” or remodel) of the units. HACEP is almost complete with the conversion of its 6,200 public housing units. A small number of the conversions were “paper transactions” involving newer facilities that did not need any construction or repairs. The newly constructed or rehabilitated units that are completed are already fully stabilized (meaning, achieving 90% occupancy within 90 days from completion of all units). There are, however, about 1,000-plus units that will be coming on line in late 2019 and 2020. EP Home, with HACEP, will have the responsibility to oversee the RAD conversion elements, manage the resident relocations, and oversee the financial and accounting aspects of the construction management. However, the selected subcontractor will have responsibility to assist in the following areas: lease-up, creation of new resident files, and compliance obligations for this conversion process. (EP Home and HACEP will be responsible for the transition and exit of third-party developers as they complete their obligations and exit the projects). Additional information about the RAD Transitional services are listed on [Appendix D](#).

III. Minimum Qualification and Experience Requirements.

In order to qualify to provide property management services under this RFP, the proposer must meet the following minimum qualification and experience requirements:

1. Minimum of five (5) years of residential property management experience managing and maintaining at least 20,000 units;
2. Minimum of five years' experience managing affordable-housing residential units such as multifamily (PBRA/PBV), low income housing tax credits (LIHTC), HOME-funded, HUD Section 202, NSP, Public Housing, or similar affordable-housing programs where low- and very-low income families receive rental assistance and/or subsidies (meaning, experience with HUD subsidy platforms and rent recertifications that require verification and rent based on a ratio to the resident's income);
3. Minimum of five (5) years of residential property financial tracking, accounting, maintenance, and reporting experience;
4. Ability to assign property managers who hold recognized property management certification(s) from a recognized residential property management industry association (if property managers will be hired, proposer must certify it will only hire certified property managers, accepted certifications include: OCS, SHCM, HCCP, CPM, ARM, and/or PHM (or equivalent) or able to obtain such certifications within six months of contract commencement);
5. Ability to assign maintenance staff who hold any required licenses, certificates or permits to perform their respective maintenance services
6. Capacity to increase property management and maintenance services over additional units, upon reasonable advance notice, during the scope of any contract;
7. Experience with Yardi (which is currently being used by EP Home) another property management software or other Enterprise Resource Planning/Business Process Management Software ("**ERP**") system implementation and utilization for management of a large residential portfolio;
8. Meeting insurance requirements set forth in Appendix E hereto; and
9. History of successful compliance managing similar types of apartments/portfolio.

Note on Inclusion of Sub-Subcontractors: Proposers responding to this RFP may associate with and include one or more subcontractors to their organization in their proposal. To the extent sub-subcontractors are included in a proposal, the Proposer must include the following information as to each subcontractor:

1. Name of Subcontractor
2. Principals (Owners, Management Team)
3. Contact Information (Address, Telephone, Fax, Email, web page)
4. Proposed Role/Responsibilities
5. Briefly State Qualifications and Experience
6. Complete the following forms for each such Subcontractor:
 - Vendor Information Form
 - Section 3 Certification and Action Plan (if applicable)
 - Certification and Representations of Offers (Non-Construction Contract)
 - Certification Regarding Department, Suspension, Ineligibility and Voluntary Exclusion
 - Disclosure of Lobbying Activities
 - (other forms may be required later to be executed prior to sub-contracting)

IV. Form of Submission/Proposal

A submission/proposal to provide property management services must address all of the following in the proposal. The submission/proposal may be submitted in narrative format or on a point-by-point response basis addressing each of the following points. It is the proposer's responsibility to make sure all points below are addressed in its submission/proposal:

A. General Qualifications.

1. Provide the corporate structure of your entity/organization and the state and year your entity/organization was established;
2. Identify the owners of the organization (if a non-profit, provide the names of the board of directors) and their address and telephone numbers;
3. State whether your organization meets all of the minimum qualifications stated in Section III above, at least briefly addressing each of the qualifications referenced;
4. Provide a summary of the size of residential property portfolio managed and duration of time of such management. Include number of buildings and units your organization has managed the past three (3) years;
5. Provide the name of the entity's/organization's principals who will be responsible for managing the contract, their positions and duration with your organization, along with a summary of experience or copy of their resumes;
6. Provide the name of the management-level staff anticipated to be available for the transition and performance of the contract, including whether such staff will be located in El Paso (and if not located in El Paso describe their anticipated physical presence in El Paso to manage and oversee subcontractor's role and responsibilities and identify what staff will be in El Paso);
7. Provide a brief summary of experience managing affordable housing units, with an emphasis placed on experience managing residential apartments subject to Multifamily requirements and/or funded by PBRA/PBV, tax-credit, HOME, NSP, Public Housing, and/or other government-subsidized housing programs; and

B. Property Management Experience.

1. Provide the total number of residential units managed the past three (3) years;
2. Indicate the approximate percentage of residential units managed the past three years were Multifamily, LIHTC, HOME, Section 202, Public Housing, or other

governmental subsidy program, if applicable, as well as the percentage of market-rate units (if applicable) and any experience in “blended” program management;

3. List the cities/towns/locations where your organization manages residential units;
4. Describe your organization’s lease-up program and experience;
5. Describe your organization’s compliance expertise and resources, including how your organization ensures federal (IRS/HUD/Other), State (e.g. State Financing organization), Investor/Lender compliance regulations and Investor/Lender financial requirements are met (e.g. Rent increases, Debt Service Coverage ratios).
6. List any negative compliance outcomes you have had as a property manager in the past three years and provide an explanation for the negative compliance outcome and how the negative outcome was remedied;
7. Indicate whether the financial audits of any properties your organization has managed within the past three years has resulted in any material findings and what the findings were and how they were resolved;
8. Describe the populations served in the portfolio you have managed the past three years;
9. Describe whether your organization has experience serving as a property manager for residents who are limited English proficient, mainly Spanish language dominant residents or others who do not speak or understand the English language and your process for communicating with such residents;
10. Describe whether your organization has experience serving as a property manager for housing serving elderly and/or disabled residents;
11. Describe your entity’s/organization’s experience dealing with dispute resolutions processes such as grievances for residents of residential properties you manage; and
12. Indicate whether your entity/organization, or the owner of any property you manage, has been subject to any regulatory actions taken by any oversight body (such as HUD or Texas Department of Housing and Community Affairs or similar state/local entity) during the past three years and, if there are any, describe the action taken and how it was resolved (with references to the specific agency issuing the regulatory action, the property involved, the program(s) involved, and the outcome).

C. Property Management Financial Tracking and Reporting.

1. Provide a summary of, or attach samples of, the reports your entity/organization maintains and uses for the properties it currently manages and would normally be provided to the owner of the property on a monthly basis.

D. Property Maintenance Experience.

1. Describe your entity/organization's experience in providing the maintenance services you are proposing to perform; and
2. Indicate the number of residential units your entity/organization has provided maintenance for during the past three (3) years (if applicable).

E. RAD Transitional Services Experience.

1. Describe any experience your entity/organization has had with the HUD RAD Program.
2. If no experience with RAD, please see the RAD Resource Desk for regulations regarding the transition of public housing to PBV and PBRA. Briefly discuss your understanding of these regulations as they relate to property management in particular to rents and compliance certifications and your entity/organizations experience with similar types of regulations.

F. Management Plan/Capacity.

1. Provide a summary of the management plan your entity/organization would utilize for overseeing the properties.
2. Address how your entity/organization has the capacity to serve as manager for the properties.

G. Transition Plan.

1. In your proposal, please describe how your company would propose to transition as the property management company for the portfolio.
2. In addition, EP Home and certain Affiliates currently employ approximately 130 individuals performing the functions sought to be performed by the subcontractor(s) selected. This includes regional managers, property managers, assistant property managers, property accountants, maintenance staff, and others. The vast majority, if not all, of these employees will be available to work for a successful contractor. Please include in your proposal what efforts, if any, your

organization will make to interview, recruit, and retain these individuals in the event your organization is awarded a contract.

3. Provide your entity's/organization's types of group insurance benefits and other fringe benefits (such as sick leave, vacation, and holidays) offered to employees in the roles to be performed under the contract.
4. Briefly describe or summarize your organization's policies, practices or commitments to its employees and residents it serves with regard to diversity, equity and inclusivity.

H. Fee Structure.

1. Provide your entity's/organization's proposed fee structure for the properties and detail all services covered by the fee and positions covered, if any.
2. Indicate whether the fee is based on a percentage (and if so, whether the fee is based on rents collected, rents billed or some other amount), a per-unit fee, a flat fee or on some other basis.
3. If your entity/organization intends to charge additional fees for various transactions, occurrences or other items, include the fees and when and how they arise.
4. Note: EP Home intends to include performance metrics in the eventual contract that will include financial incentives for positive performance and potential disincentives for noncompliant performance. Feel free to address this concept, if you so choose, in your proposed fee structure.

I. References/Past History.

1. Provide the name of a contact person in management for three property owners your entity/organization has served as manager at some time during the past three years;
2. Include the contact person's title, telephone number, email and address; and
3. Disclose all citations, sanctions, reprimands, criminal convictions, or criminal investigations that Respondents' firm has received in the past five (5) years from any governing body (include any Fair Housing, real estate regulation, or LIHTC compliance violation of a material nature).

J. Financial Condition and Insurance Coverage.

1. Describe your entity’s/organization’s financial condition for the past three years);
2. Provide a current financial statement of the Respondent prepared by a Certified Public Accountant, along with the firm's most recent audit (if any). The statement should show assets, liabilities and net worth of the Respondent and should include information on all general partners or principal shareholders or members. Provide unaudited financial reports if no audited reports are available. Any respondent who desires for this information to be kept confidential should provide this information in a separate sealed envelope clearly marked “confidential information.”
3. In addition, please state whether your entity/organization can provide evidence of possession of insurance (see Minimum Insurance Requirements in Appendix D).

K. Required Forms and Submissions

The following forms and submissions must be completed (or, if informational only, acknowledged) and included (or acknowledged) in the proposal, see Appendix F below for the actual documents/forms.

Form/Document	Requires Signature/Execution by Offeror	For Information Purposes/Acknowledged By Offeror and No Signature Required
1. Solicitation, Offer, and Award	X	
2. Clauses Incorporated by Reference		X
3. General Conditions for Non-Construction Contracts		X
4. Instructions to Offerors		X
5. Conflicts Certification	X	
6. Section 3 Certification and Action Plan (if applicable)	X	
7. Certification and Representations of Offers (Non-Construction Contract)/ Priority Certification	X	
8. Certification Regarding Department, Suspension, Ineligibility and Voluntary Exclusion	X	
9. Disclosure of Lobbying Activities	X	
10. Vendor Information Form	X	
11. Travel Reimbursement Guidelines	X	
12. Use of Disadvantaged Business Enterprises (DBEs), Minority Business Enterprises (MBEs), and Women’s Business Enterprises (WBEs)	X	
13. Statement of Offeror’s Qualifications	X	
14. Form of Non-Collusive Affidavit Prime Offeror	X	
15. Certification of Equal Employment Opportunity	X	
16. Federal Labor Standards Certification	X	
17. Agreement to Contract Electronically	X	

L. Number of Copies/Electronic Submissions

Offerors are required submit one (1) unbound master copy (so marked), three (3) printed paper copies and one electronic digital copy (CD or USB) of their proposal delivered to Juan Pulido, Procurement Manager, 5300 E. Paisano Dr., El Paso, Texas 79905. Electronic copies may be sent by email to: jpulido@hacep.org, however only the physical electronic/paper copies delivered shall count for purposes of receipt of the proposal.

Note: Responses to this RFP are due by July 26, 2019 at 3:00 p.m. Mountain Time.

V. Evaluation Criteria

Proposals to provide residential property management services will be based on the following factors, on a 100-point scale, as weighted by the point totals shown below:

Maximum Points Available	Factor	Factor Type
30	Property Management Qualifications and Experience, including experience with HUD subsidy platforms and programs	Subjective (Technical)
25	Proposed Fee Structure	Objective
15	Management Plan/Capacity	Subjective (Technical)
10	Transition Plan	Subjective (Technical)
10	Financial Condition/Insurance	Objective
5	RAD Experience	Subjective (Technical)
5	References	Objective

The award of points for each category listed above will be based upon the documentation that the proposer submits within its proposal submittal.

VI. Miscellaneous RFP Instructions and Information

A. Executive Summary Notice Request for Proposal (RFP)

1. The purpose of this Executive Notice is to highlight the key requirements of the Request for Proposal (“*RFP*”).
2. EP Housing and Operations Management PFC d/b/a EP Home, in conjunction with its sponsor, the Housing Authority of the City of El Paso, Texas (“*HACEP*”) is requesting proposals from qualified firms to provide property management services. EP Home reserves the right to award multiple contracts.
3. Offers received in response to this solicitation will be evaluated using the Technical Proposal Evaluation Process. Offers must be submitted in accordance with the instructions provided in the RFP. Failure to furnish a complete offer at the time and date specified in the solicitation may result in elimination from consideration. Term of this contract is for a two (2) year base with three (3) one-year renewal options.
4. Formal communications such as requests for clarifications and/or information concerning this solicitation shall be submitted in writing no later than **July 5, 2019 at 5:00 p.m.** local time (Mountain Time) and directed to **Juan Pulido, Procurement Manager, EP Home, 5300 E. Paisano Dr., El Paso, Texas 79905** or emailed to jpulido@hacep.org .
5. **Any form of material contact or effort to influence the RFP by an offeror or potential offeror regarding this RFP, at any time during the solicitation process from initial advertisement through award, with Board of Directors of EP Home or Commissioners of HACEP or any person employed by HACEP, other than through the communication channels stipulated in the RFP, or as subsequently instructed by EP Home through the solicitation process, will constitute grounds for rejection of the Offeror’s Proposal.**
6. As EP Home is interested in limiting costs associated with the acquisition process, offerors not intending to continue with the RFP are requested to submit a letter requesting they be taken off the mailing list for this solicitation. EP Home reserves the right to reject any or all proposals.
7. **Offerors are required to submit one (1) unbound master copy (so marked), three (3) printed paper copies and one electronic digital copy (CD or USB) of their proposal to EP Home, Attn: Juan Pulido, Procurement Manager, 5300 E. Paisano Dr., El Paso, Texas 79905.** Electronic copies may be sent by email to jpulido@hacep.org. **Responses are due by July 26, 2019 at 3:00 p.m. Mountain Time.**
8. **This solicitation and subsequent amendments shall supersede any posting made through the NAHRO e-procurement system. Potential offerors are advised to review the dates contained in this solicitation in the event of a discrepancy between dates listed in this solicitation and dates listed on the NAHRO e-procurement system.**
9. Thank you for your interest in this project. We look forward to receiving your proposal.
/s/ Gerald Cichon
Gerald Cichon, Chief Executive Officer of EP Home

B. Review and Scoring of Proposals. A committee of individuals selected by EP Home, in its discretion, will evaluate proposals submitting in response to this RFP. The review committee may include EP Home employees, employees of affiliates, subject matter experts, and third parties hired or retained by EP Home.

The proposals will be scored pursuant to the evaluation criteria posted in this RFP. Generally, a short list of prospective “finalists” will be determined based on the written submissions received, evaluated, and scored. EP Home may conduct interviews with the finalists. The interview process will be included and considered in determining the award(s) issued in response to this RFP. Stated otherwise, the interviews of the finalists and information received during the interview process may be used by EP Home to determine the top-rated respondent(s). The interview scoring will follow the evaluation criteria set forth in this RFP.

C. Acknowledgement of Amendments. The Respondent shall acknowledge in its response to this Request for Proposal, receipt of any amendment(s). The Respondent’s failure to acknowledge an amendment may result in rejection of the response. EP Home will endeavor to provide copies of applicable amendment or addenda to all potential Respondents to whom this RFP has been transmitted. However, it will be the responsibility of each Respondent to make inquiry as to the existence and content of amendment or addenda, as the same shall become part of this RFP and all Respondents will be bound thereby, whether or not the amendment or addenda are actually received by the Respondent.

D. Complete and Accurate Submission. A Respondent’s failure to provide accurate information in response to this RFP may disqualify the Respondent from further participation in the selection process. Responses may be corrected, modified, or withdrawn, provided that the correction, modification, or request for withdrawal is made by the Respondent, in writing, and is received by EP Home’s designated representative for this RFP (Juan Pulido, Procurement Manager) prior to the date and time designated in the RFP for final receipt of submissions. After such date and time, the Respondent may not change any provision of its proposal in a manner prejudicial to the interest of EP Home and/or fair competition. Respondents are solely responsible for ensuring timely delivery by courier services or other appropriate (and confirmable) means of delivery); EP Home will not accept any responses to this solicitation, after the final deadline, due to Respondent’s misunderstanding of courier service hours and delivery times, or for any other reason.

E. Retention. All submissions, including attachments, images, presentations and other documents are and remain the property of EP Home. EP Home will retain the records in the ordinary course of its business and per its retention schedule. Responses or other materials provided in support of a response will not be returned.

F. Cancellation or Waiver. EP Home reserves the right to cancel this RFP or to reject, in whole or in part, any and all submissions received in response to this RFP upon its determination that such cancellation or rejection is in the best interest of EP Home. EP Home further reserves the right to waive any minor informality in any submissions received, if it is in the public interest to do so. The decision as to who shall receive a contract award, or whether or not an award shall

be made as a result of this RFP, shall be at the absolute sole discretion of EP Home. In addition, multiple awards may be made.

G. Key Personnel. The key personnel specified by the successful Respondent will be considered essential to the work to be performed by the successful Respondent. Prior to diverting any of the key personnel for any reason(s), the contractor shall notify EP Home in writing, at least thirty (30) calendar days in advance, and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the contract. The firm shall not change key personnel or hours to be devoted, before or after contract award, without written permission from EP Home.

H. RFP Packet/Response(s) Incorporated Into Contract. The contents of this RFP and the documents submitted by the successful Respondent shall become part of and incorporated into any contract award, except as specifically agreed otherwise by the parties.

I. No Compensation or Reimbursement for Submitting Proposal. Respondent will not be compensated or reimbursed for work, services, efforts, or costs related to preparation and submission of its proposal. Respondents selected for further interviews and negotiations will be responsible for all of their own expenses incurred during these processes.

J. Initial Review. All responses will be initially reviewed to determine compliance with the response format requirements specified within this RFP. Responses that are not complete and accurate; and, do not comply with these requirements may result in disqualification from the solicitation without further review.

K. EP Home's Options. EP Home will pay no compensation and issue no reimbursements to any Respondent for any costs related to preparation or submittal of the responses. EP Home will reject the responses of any Respondent who is suspended and/or debarred by HUD or other government agency from providing services to public housing authorities, and reserves the right to reject the proposal of any Respondent who has previously failed to perform any contract satisfactorily for the needs of the services sought. The determination of the criteria and process whereby submissions are evaluated and the decision as to whom shall receive a contract award shall be at the sole and absolute discretion of EP Home.

L. Best and Final Offers/Negotiations. EP Home may ask respondents to make a "best and final offer" or "BAFO" as part of the negotiation and contracting process. EP Home may also negotiate with one or more respondents over the terms of any ultimate contract. In the event a selected organization or firm and EP Home cannot negotiate a satisfactory development agreement and business terms, EP Home reserves the right to move on to negotiations with the next highest selected respondent(s).

M. Receipt. By submitting a response to this RFP, Respondent acknowledges and agrees to the following conditions:

- All submissions in response to this RFP become the property of HACEP. As such, all submissions will be considered public records and will be subject to public review.
- No Respondent shall initiate contact with any EP Home or HACEP employee and/or member of the Board of Directors of EP Home/Board of Commissioners of HACEP regarding this RFP until after completion of the selection process, Board members' approval and execution of a contract. If any Respondent has any reason, not related to this RFP, to contact any of the above parties, they will be required to disclose to that party that they are a respondent in this solicitation. Failure to adhere to these requirements may result in disqualification from the solicitation process.
- Respondent shall not have employed or retained any company or person, other than a bona fide employee working solely for the Respondent to solicit or secure the execution of a contract with EP Home. Respondent certifies that they have not paid or agreed to pay any person, company, corporation, individual or firm other than a bona fide employee working solely for the Respondent, any fee, commission, percentage, gift or any other consideration, contingent upon or resulting from the award of or the making of a contract from this solicitation.
- EP Home and/or HACEP are governmental entities subject to the Texas Open Records Act. Thus, the records and documents Respondent submits, including Respondent's Proposal, is subject to disclosure pursuant to this law. To the extent information is considered proprietary, confidential, or sensitive, Respondent should mark it clearly as such. This will be taken into consideration in the event a request is submitted for a copy of Respondent's materials.

N. Contract Draft/Termination Notice of 12 Months. A sample contract will be made available to interested parties during the RFP process, with the contract to be negotiated and finalized after an award is made. **Due to the size and scope of the property management services, the contract will include a lengthy notice of termination provision; specifically, if either party wishes to terminate the contract (except for cause), the party desiring to terminate shall be obligated to provide at least 12 months advance notice to the other party to ensure an orderly and smooth transition to a new property manager subcontractor.**

APPENDIX A

Property List

The residential properties for which property management and maintenance services are sought are contained in the attached spreadsheet.

APPENDIX B

Property Management Services

A. Hours of Operation.

The hours of operation requested of the contractor(s) selected for property management services subcontract(s) will be as follows:

1. The property management services subcontractor will be responsible for providing on-site property management services during regular work hours, Monday to Friday, from 8:00 a.m. to 5:00 p.m. with normal closures during breaks, meal periods or on established holidays. At some properties, the schedule may vary one or two days per week with a later start time so that the property managers are available into the early evening to accommodate residents who work.
2. The property management services subcontractor will be responsible for providing after-hours and emergency coverage on an on-call basis.

B. Scope of Work.

1. **General Property Management.** The property management services subcontractor will be responsible for providing on-site property management staff to provide the following scope of services:
 - a. Implementing annual rent schedules and annual utility allowances from HAP Contracts;
 - b. Providing initial and continuing lease-up of all housing units, including determining and ensuring eligibility of all residents per program requirements and policies;
 - c. Conducting annual income and rent recertification required for each resident family;
 - d. Arranging and overseeing separate maintenance contract staff in the routine maintenance and minor repairs of properties, including overseeing arrangements for maintenance, janitorial, and landscaping services;
 - e. Ensuring that all properties are well maintained and that there are safe, decent, and sanitary living conditions at all times for all residents;
 - f. Providing assistance and oversight to ensure that emergency maintenance is performed and completed (by separate maintenance services contractor/personnel) in a timely manner and that such repairs are completed appropriate and complete manner;

- g. Identifying and addressing emergency situations that may arise and immediately notifying EP Home/HACEP/designated contact(s) and/or providing follow-up action to remedy emergency situation;
- h. Providing excellent customer services to include being available to assisting residents with problems, questions, or concerns related to their residences, leases, eligibility, etc.;
- i. Ensuring rents are paid on time and overseeing and documenting the process to evict non-paying residents or residents who otherwise violate terms of the lease agreement;
- j. Collecting security deposits;
- k. Conducting annual inspections to ensure compliance with governmental, program, and owner requirements;
- l. Executing marketing plans and tenant selection procedures, and to ensure that such plans comply with non-discrimination and Fair Housing Act obligations;
- m. Developing and maintaining accurate and concise operating budgets including costs for operations, general maintenance, and repair (with the operating budget to include suggested capital improvements, detailed suggestions for the improved operation of the properties covered and a detailed narrative); and
- n. Communicating on a regular basis with EP Home and/or HACEP to ensure the scope of services and reporting is being completed.

2. Property Management Compliance Obligations.

- a. Compiling and maintaining accurate records and files pursuant to governmental and EP Home/HACEP/owner requirements for reporting;
- b. Process resident certifications;
- c. Transmit resident vouchers;
- d. Provide reminder letters and rent change letters;
- e. Provide notices due at move-in and annual recertification;
- f. Monitor compliance;
- g. Perform required reconciliations;

- h. Input and transmit electronic compliance reports;
- i. Monitor tenant payments and deposits;
- j. Ensuring compliance with HUD Multifamily requirements;
- k. Ensuring compliance with TDHCA requirements for LIHTC;
- l. Responding to MORs by HUD and Compliance Reviews by the Tax Credit Monitoring Agency (TDHCA) and/or investor/lender;
- m. Completing asset management reporting requirements; and
- n. Ensuring compliance requirements imposed by investors, lenders, or other parties.

3. ERP System Implementation and Utilization.

- a. Implementing a computer operating system and/or software to manage the portfolio;
- b. Training staff to use the system; and
- c. Maintaining and utilizing the system to successfully manage, operate, track, and report on the portfolio's performance.

4. Capital Planning

- a. Preparation of annual operating budgets per property; and
- b. Identifying long-term capital needs.

C. Reporting Requirements.

The property management services reporting requirements will include, but are not limited to, the following:

- a. Monthly financial statements with budgeted vs. actual and explanation of material variances;
- b. Cash flow report(s);
- c. Rental income, accounts receivable and aging report;
- d. Accounts payable;
- e. Bank reconciliations;

- f. Move-in and move-out reports;
- g. Make-Ready report;
- h. Waiting list report;
- i. Maintenance and preventative maintenance reports; and
- j. Compliance due dates report.

D. Staffing Requirements.

For all property management activities, the subcontractor must:

- a. Provide and Supervise Property Management Staffing: Subcontractor shall provide all of its own personnel and staff; subcontractor shall be solely responsible to hire, compensate, provide benefits for, direct, and supervise all of its personnel and staff.
- b. Provide Training, Certification, and Licensure: Subcontractor shall be responsible for providing training, certification(s), and license(s) required for its own operations and to ensure its personnel and staff hold certification(s) and license(s) to perform all property maintenance services.
- c. Conduct Staffing Background Checks: All of Subcontractor's personnel and staff must pass an appropriate background check for the safety of residents, employees, and the public.
- d. Meet Minimum Insurance Requirements: Subcontractor must maintain workers' compensation insurance for its employees and meet all other insurance requirements set forth in the RFP.

It is expected that the selected subcontractor(s) will have a local office and senior management presence in El Paso for the transition period and throughout the duration of any services.

EP Home has hired and trained a larger number of property management personnel who are currently on EP Home's staff. The staff includes property managers, assistant property managers, property accountants, and maintenance staff, among others. We anticipate that and encourage the selected subcontractor(s) to interview and consider these EP Home employees for employment, as needed by the subcontractor(s), during the subcontractor's hiring process during the transition period, with any selected EP Home employees to be offered employment with the subcontractor on or after the "go live" date.

APPENDIX C

Property Maintenance Services

A. Hours of Operation.

The hours of operation requested of the subcontractor(s) selected for a residential property maintenance services contract(s) will be as follows:

1. Regular Hours: The maintenance management services subcontractor will be responsible for providing on-site property maintenance services during regular work hours, Monday to Friday, from 8:00 a.m. to 5:00 p.m. with normal closures during breaks, meal periods or on established holidays. At some properties, the schedule may vary one or two days per week with a later start time so that the property maintenance staff are available into the early evening to accommodate residents who work.
2. Emergency Maintenance Operations/Hours: Subcontractor shall ensure that adequate after-hours and emergency maintenance operations are available and responsive on a 24-hour, 7-day-per week basis.

B. Scope of Work.

The property maintenance services subcontractor(s) will be responsible for providing the scope of services listed below.

1. Emergency Maintenance: Providing emergency maintenance needs for entire residential property portfolio, with adequate 24-hour, 7-day-per week maintenance staff to respond to emergency maintenance needs.
2. Roofing: Repairing roofing leaks and damage, utilizing and installing roofing materials, clearing vents and roof drainage
3. Windows and Doors: Repairing and/or replacing windows and doors, repairing hinges, handles, locks, and latches.
4. Plumbing: Repairing plumbing leaks, stoppages, and problems, cleaning drains and traps, servicing and maintaining boilers and water heaters, insulating pipes and water heaters, and performing other minor plumbing repairs;
5. Painting: Painting exterior and interior walls, touch-up painting and repairing holes, scratches, stains, and cover up graffiti on walls.
6. Flooring, Countertops, and Built-in-Storage: Repairing and, as necessary, installing, various types of flooring (carpet, tile, etc.), countertops and built-in storage facilities.

7. Electrical: Replacing light bulbs, repairing light fixtures, inspect wiring periodically to ensure it is in safe condition, to ensure access to meters and switches, replace fuses, ensure wiring, cables and conduits are firmly attached and secured.
8. Heating and Air Conditioner Systems -Repair and Maintenance: Providing service and repairs on both evaporative “swamp” cooler systems, HVAC/Central Air Units, and building HVAC systems, and to perform semi-annual “switch over” of evaporative cooler systems pre-summer (for cooling) and pre-winter (for heating) of each year.
9. Energy Conservation and Weatherization: Providing assistance and recommendations to implement energy conservation and weatherization systems; caulking window frames, installing and repairing weather stripping for doors and window frames, installing flow-reducing water devices (showers, faucets, commodes).
10. Make-Ready Services: Performing full make-ready (vacancy turnaround) services so that residential units are ready to be re-leased to a new resident within three days of being vacated by a resident.
11. General Preventative Maintenance: Providing routine checking on the physical needs and condition of walls, doors, windows, flooring, electrical systems, HVAC systems, and property.
12. Safety Equipment Inspection and Repairs: Ensuring that fire equipment and safety equipment on site is properly maintained, including checking that smoke detectors working and batteries replaced when needed, and keeping fire escape routes (stairs, corridors, fire escapes) free of obstruction.
13. Grounds Maintenance/Landscaping: Providing full-service grounds maintenance for apartment complexes and residential communities, repairing cracks in paths, sidewalks, walls, repairing outdoor rock and cement walls, cleaning rocks, trimming shrubs, bushes and trees and cutting grass, monitoring landscaping needs.
14. Elevators: Assisting with minor maintenance regarding elevators, coordinate with separate elevator contractor for specialized elevator repair/maintenance.
15. Other/Miscellaneous Property Maintenance Services: To include interior and exterior maintenance-related cleaning, cleaning up debris left on site after maintenance services are performed, repair building code violations, meet and confer with third-party contractors who are assigned to assist with specialized maintenance tasks, providing maintenance needs at property managers’ offices, residential community centers, and central office locations.
16. Maintenance Support Services: Proposer may further be required to perform the following support services:

- a. *Maintenance and Capital Planning*: To include planning and supervising maintenance and repair activity for all residential properties, as well as to, in conjunction with HACEP management, developing and maintaining schedules of pending and planned maintenance projects, to be available to advise HACEP management on the selection of materials and equipment to be procured for the maintenance of the units. Furthermore, to identify possible needed capital improvements and participate in the planning process.
- b. *Maintenance Policy Compliance*: To include maintaining files and records required for maintenance of LIHTC, HOME and Section 202 properties and ensuring EP Home/HACEP/owner maintenance and repair policies are met.
- c. *Resident Relations and Satisfaction*: To ensure excellent relations and customer service with residents, and that there is excellent resident satisfaction with the condition of the grounds, common areas, and units.
- d. *Electronic Maintenance Tracking and Reporting*: To implement and use electronic maintenance management data systems and programs to track maintenance requests, needs, repairs, repair-response times, complaints, etc. and to provide information/data necessary for all required maintenance reports required by HUD, TDHCA or other oversight agency(ies).
- e. *Maintenance-Related Budgeting*: To develop budgets for regular and emergency maintenance needs listed in scope of services (Section A above), with the goal of meeting the needs of residential communities and their residents, as well as to assist EP Home or HACEP management in the development of the annual operating budget with respect to maintenance program needs.
- f. *Communications*: To remain in constant contact/communications with EP Home and/or HACEP management assigned point-of-contact personnel, and property managers to ensure responsiveness and quality of maintenance services.
- g. *Maintenance Procurement Advisory Role*: To include advising EP Home and/or HACEP procurement staff as to pending and planned maintenance supply and equipment needs, assessing and reviewing existing warranties/manufacture instructions, providing advisory role on new equipment purchases.

C. Staffing Requirements. See D above

For all maintenance activities, the subcontractor must:

1. Provide and Supervise Maintenance Staffing: Subcontractor shall provide all of its own personnel and staff; subcontractor shall be solely responsible to hire, compensate, provide benefits for, direct and supervise all of its personnel and staff.
2. Provide Training, Certification, and Licensure: Subcontractor shall be responsible for providing training, certification(s), and license(s) required for its own operations and to ensure its personnel and staff hold certification(s) and license(s) to perform all property maintenance services.
3. Conduct Staffing Background Checks: All of Subcontractor's personnel and staff must pass an appropriate background check for the safety of residents, employees, and the public.
4. Meet Minimum Insurance Requirements: Subcontractor must maintain workers' compensation insurance for its employees and meet all other insurance requirements set forth in the RFP.

APPENDIX D

RAD Transitional Services

A. Hours of Operation.

The hours of operation requested of the subcontractor(s) selected for a residential property maintenance services contract(s) will be as follows:

1. Regular Hours: The subcontractor will be responsible for providing on-site services during regular work hours, Monday to Friday, from 8:00 a.m. to 5:00 p.m. with normal closures during breaks, meal periods or on established holidays. These services will be performed at the management location and at the properties. As such, the schedule may vary depending on the task that needs to be performed.
2. Emergency Maintenance Operations/Hours: Subcontractor shall ensure that adequate after-hours and emergency operations are available and responsive on a 24-hour, 7-day-per week basis.

B. Scope of Work.

The subcontractor(s) will be responsible for providing the scope of services listed below for the projects that expect to be in the midst of the RAD conversion process, a limited number of units by the time the subcontractor(s) go live.

1. Accommodating EP Home's and HACEP's Relocation of Residents – as guided by the HACEP RAD Relocation team, the subcontractor will need to assist and accommodate the relocation of residents from units that will be demolished or rehabbed and the move-in of right to return residents and applicants from the waiting list. Relocations must be done in-line with RAD closings or leasing schedules in financing models.
2. Implement Rent Schedules, including Utility Allowances from HAP Contracts,
3. Perform Initial Certifications for Tax Credit units along with Initial Certs for PBRA or other Affordable programs. Submit for review to auditor and investor/lender(s). Note that the Effective Date of the Tax Credit Certs is the move-in date to the newly developed/rehabbed unit but the PBRA Effective Date for Right-To Return residents is their initial move in date when the property was public housing.
4. Submit Certs and Vouchers by the 10th of the month – currently the process is to request Rehab Assistance payments as applicable, zero based vouchers and then vouchers requesting monthly HAP subsidy. Errors are to be corrected so that voucher payment can be received in the month projected to be received.
5. Transition General Ledgers from Development to Property Accounting.
6. Awareness of RAD program requirements, including resident rights under RAD, and ability meet such requirements and accommodate residents for RAD purposes.
7. Shall be responsible for ALL compliance requirement at the property.

APPENDIX F

Minimum Insurance Requirements

Upon commencement as a subcontractor, the selected respondent will procure and maintain at all times and at the subcontractor's own expense, at a minimum, the following types of insurance. The insurance carriers used by subcontractor must be authorized to do business in the State of Texas and the insurance provided will cover all operations under the Management Agreement, whether performed by the subcontractor or its own subcontractors.

Workers Compensation and Occupational Disease Insurance in accordance with the laws of the State of Texas, and with a minimum employer's liability limit of \$1,000,000 per occurrence.

Employer's Liability Insurance covering claims and suits by or on behalf of employees not otherwise covered by statutory Workers' Compensation insurance with minimum limits of \$500,000.

Commercial General Liability Insurance (primary and umbrella) or equivalent with limits of not less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate, combined single limit, for bodily injury, personal injury, and property damage liability. Such policy shall include coverage for contractual liability under the Management Agreement. The Owner is to be named as an additional insured on a primary non-contributory basis for any liability arising directly or indirectly from the services contemplated by the Management Agreement.

Automobile Liability Insurance (Primary and Umbrella) for motor vehicles (owned, non-owned and hired) used in connection with the services to be performed, covered with comprehensive automobile liability insurance with limits of not less than \$2,000,000.00 per occurrence combined single limit, for bodily injury and property damage. The Owner is to be named as an additional insured on a primary non-contributory basis.

All Risk Property Insurance in the minimum amount of \$50,000 insuring the contractor's personal property.

Bonding for Subcontractor and all personnel of subcontractor who handle or who are responsible for handling a property owner's monies shall be bonded in favor of the Owner of the Property, providing coverage of \$2,000,000 per occurrence with a \$10,000 deductible.

APPENDIX F

Required Forms, Exhibits, Attachments

(attached in separate document)