

**REQUEST FOR PROPOSALS
HOMEOWNER RETENTION SUPPORT FOR
LOW- TO MODERATE-INCOME HOMEOWNERS IN
NORTH AND NORTHEAST PORTLAND**

Proposals Due: Friday May 28, 2010 at 3:00 PM (PDT)

SUMMARY: The City of Portland, through the Portland Housing Bureau, will make available \$120,000 to a community-based organization(s) with services in North or Northeast Portland to provide direct outreach and support to low and moderate-income, homeowners in North and Northeast Portland that are at risk of losing their homes. The goal for this funding is to help low-income senior citizen homeowners in N/NE Portland retain both their homes and their equity interest in their homes

INFORMATION SESSION: a NON-MANDATORY session for this solicitation will be held on **Wednesday May 5, 2010 in the Portland Housing Bureau (PHB) Steel Conference Room on the 5th floor at 421 SW 6th Ave, Portland, Oregon, from 2:00 P.M. - 3:00 P.M.**

EVALUATION CRITERIA:

Program Proposal	35 points
Qualifications and Capabilities	35 points
Cultural Competency	15 points
Price Proposal	15 points
Maximum Score	100 points

SOLICITATION COORDINATOR:

David Sheern
Portland Housing Bureau
421 SW 6th Ave, Suite 500
Portland, Oregon 97204

(503) 823-4103 (phone)

(503) 865-3644 (fax)

sheernd@pdc.us

<http://www.portlandonline.com/bhcd/index.cfm?c=26428>



Participation of certified minority-owned, women-owned & emerging small businesses is encouraged.

INFORMATION

Request for Proposals Title: Homeowner Retention Support for Low- to Moderate-Income Homeowners in North and Northeast Portland

**Solicitation Coordinator:
& Contact Information** David Sheern, Program Coordinator
Portland Housing Bureau
(503) 823-4103 (office phone)
(503) 865-3644 (fax)
sheernd@pdc.us

Proposal Due Date/Time: **Friday May 28, 2010 at 3:00 PM (PDT)**
Proposal Delivery Location: Portland Housing Bureau
421 SW 6th Ave, Suite 500
Portland, OR 97204

Direct all questions regarding this RFP to David Sheern.

SCHEDULE

Non-Mandatory Information Session **May 5, 2010**
2:00 P.M. to 3:00 P.M.
PHB Steel Conference Room
421 SW 6th Ave, Suite 500

Proposals Due: **May 28, 2010 at 3:00 PM (PDT)**

Anticipated Date Evaluation Panel Meets: June 7, 2010

Anticipated Notice of Awards: June 16, 2010

All proposals must be received by the date and time proposals are due to be considered. The Portland Housing Bureau reserves the right to change any dates to serve goals of RFP.

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I. INTRODUCTION

Leaders of the North and Northeast Portland community have witnessed and reported to the Portland Housing Bureau (PHB) an ongoing trend of long-standing, low- and moderate-income homeowners experiencing loss of homeownership and displacement from the community due to a variety of factors that include unclear title, property tax foreclosure, predatory lending, need for critical home repair services, estate planning and Medicaid eligibility issues. Community leaders have indicated that, low- and moderate-income homeowners, particularly seniors and members of communities of color, may not be accessing existing homeowner assistance programs. Additionally, homeowners at risk of losing their homes may be hesitant to access programs due to the lack of direct, personal outreach and trusted relationship with the individuals and organizations providing the programs. In some cases, existing programs may not solve all of the problems threatening to displace an affected homeowner, and additional services like free or low-cost legal assistance may be needed to address the issues.

In response, PHB is soliciting proposals from community organizations to apply for funding to provide direct outreach and assistance to connect low- to moderate-income homeowners in North/Northeast Portland with existing community programs and resources to support home retention. In addition, PHB seeks to work with the contracted organization to increase coordination among existing community, homeowner outreach efforts and to identify gaps and bottlenecks in the existing community programs serving at-risk homeowners.

Program Goals:

- Mitigate loss of homeownership and displacement among low- and moderate-income homeowners in North and Northeast Portland. The primary focus will be to directly reach senior homeowners of color most at risk of displacement and to assist them with accessing the available services needed to keep them in their home;
- Preserve wealth within the community by assisting low- and moderate-income homeowners to retain equity in their homes, with an emphasis on serving senior homeowners of color;
- Improve awareness and utilization of community homeownership programs in N/NE Portland;
- Improve coordination among organizations providing outreach to at-risk homeowners;
- Identify gaps and/or bottlenecks in the current system of programs serving at-risk homeowners and report findings back to the PHB;
- Improve homeowner program delivery through creating a better understanding of the scope of need and through improved coordination among organizations and programs
- Facilitate individual and group information sharing of information among clients and related program providers;
- Actively market and promote the availability of this service throughout N/NE Portland, especially to long-term low-income homeowners struggling to keep their homes;

II. PROGRAM COMPONENTS AND GUIDELINES

1. Program Components

The following general program components should be included within program proposals. However, PHB encourages creativity in creating proposals, based on understanding of the issues facing low- and moderate-income homeowners and the strengths of proposing organizations which best achieve the program goals listed on page 4.

a. Direct Outreach and Assistance to At-Risk Homeowners

- Identify at-risk homeowners through contact and communication with community organizations and stakeholders and any other effective means, including churches and community leaders.
- Make direct contact with homeowners at risk of losing their homes.
- Work with homeowners to identify issues threatening retention and create specific plans of action for resolving the issues
- Connect homeowners with appropriate community programs, financial and legal resources based on the plans of action.
- Provide support to homeowners in contacting referral organizations, confirming program eligibility, completing and submitting required application materials.
- Follow-up with homeowners to ensure that they have successfully received a commitment of appropriate community resources and have resolved the issues threatening retention.

b. Coordination of Existing Homeowner Outreach Efforts

- Identify individuals and organizations currently providing outreach to at-risk homeowners in North and Northeast Portland or providing services that support home retention by this population.
- Develop and implement a plan for improving communication and coordination among outreach efforts
- Organize quarterly meetings of service providers to share updates and problem solve related program delivery challenges

c. Reporting

- Provide monthly reports to PHB documenting the number and type of issues threatening the homeowners and the number of households being served
- Identify and report to PHB gaps and/or bottlenecks in the current system of programs serving homeowners
- Identify and report ideas for sustainable community-based solutions.

2. General Program Guidelines

- Proposers: Can be individuals or organizations, for-profit, non-profit, or public housing authorities.

- Term: The contract term will expire June 30, 2011. This Is a Pilot Project, funded for one year only. Any decision to fund these services beyond the initial year will consider performance, competing needs and funding availability.
- Location: This pilot program is restricted to properties in North and Northeast Portland. For purposes of this program, North and Northeast Portland is defined by the following boundaries:

South – NE Broadway; East – NE 33rd Ave; North – N Columbia Blvd; West - Willamette River

Participation by properties outside this defined boundary is solely at the discretion of PHB.
- Combining Funds: Monies may be combined with other funds. PHB encourages proposers to identify opportunities to leverage funds with additional monetary or volunteer resources.

COVER SHEET

Home Retention Support for Low- to Moderate-Income Homeowners in North and Northeast Portland

Applications due at PHB by Friday, May 28th, 2010 at 3:00 PM (PDT)

Name of Organization:

Address:

www:

Contact Person:

Telephone:

E-mail:

Funds Requested:

In 100 words or less, summarize the proposal:

List any community partners:

The undersigned certify that the information provided herein, to the best of their knowledge, is true, complete, and accurately describes the proposal.

Signature of Board Chair

Date

Signature of Executive Director

Date

Signature of Authorized Individual and Title

Date

III. PROPOSAL CONTENT GUIDELINES

THRESHOLD REQUIREMENTS

Any proposal not meeting the guidelines and requirements of this RFP will not be considered. PHB reserves the right to reject any or all of the proposals submitted, or to fund a single or multiple proposals. The Evaluation Committee will review the proposals using the following Submittal Requirements and Evaluation Criteria.

SUBMITTAL REQUIREMENTS

Please fill out the Cover Sheet Form as the first page of your proposal, and then organize the rest of your proposal in the same order as outlined below in the Submittal Requirements.

1. **Cover Sheet:** Submit provided form as first page of the proposal.

2. **Program Proposal: (up to 35 points)**

Using the information providing in Section II:

- Describe intended efforts for identifying at-risk homeowners
- Describe method for approaching and introducing services to at-risk homeowners
- Describe method for identifying risks threatening homeowner retention and the creation of action plans
- Describe method for supporting at-risk homeowners in accessing existing homeowner retention programs and services
- Describe method for providing follow-up and close-out assistance to homeowners
- Describe potential methods for improving coordination and communication among existing homeowner outreach and assistance efforts
- Describe opportunities for leveraging program funds with additional monetary or volunteer resources
- Describe any additional program components, tasks or methods that would increase realization of the program goals listed on page 4.
- Describe proposed outcomes, measures, and method for determining program success.

3. **Qualifications and Capabilities: (up to 35 points)**

- List all staff, employees, partners and consultants playing key roles in proposed project;
- List work on similar programs or outreach efforts;
- Summarize your organization's capacity to take on proposed program. Include a list of other projects using your group's resources during proposed term of this program;
- Describe experience partnering and working with North and Northeast based community organizations;
- Describe your group's experience in providing general coordination among other organizations or programs;

4. **Cultural Competency: (up to 15 points)**

- Describe your group's cultural responsiveness and sensitivity in providing services to low-income and historically underserved populations, particularly related to affordable housing. Include demographic information from past programs demonstrating record of service to this population;
- Describe your group's experience in providing culturally-sensitive outreach to communities of color, seniors, and historically underserved populations;
- Describe your group's experience in building and maintaining trust in communities of color and historically underserved populations;
- Describe knowledge of programs and services that provide support to senior populations.

5. **Price Proposal: (up to 15 points)**

Propose the total estimated cost for all services to be provided under a contract awarded through this solicitation. This cost must include the hourly rates of each Proposer personnel assigned to perform work under an awarded contract as well as the estimated number of hours each Proposer personnel will be expected to work on each task. **A range of hourly rates is not acceptable.** Costs must include any direct or indirect costs and reimbursable expenses, based on the expected hours and billing rates for all staff involved.

6. **Proposer Certification:**

Please read, sign and return Section VI of this RFP, Proposer Certification, with the proposal.

V. PROPOSAL PREPARATION

Proposal Preparation and Submission:

Proposals shall be a maximum of six (6) pages in length, not including Cover Page.

Proposers shall submit to PHB **one (1) ORIGINAL** hard copy of the proposal, **five (5) photocopies**, and **one electronic version** by the due date, May 28th at 3 PM (PDT). The original proposal must bear an original ink signature and be marked "ORIGINAL."

The proposals must be typed. The electronic copy of the proposal should be in Microsoft Word format and emailed directly to the solicitation coordinator by the proposal due date. No oral or facsimile proposals will be accepted.

In accordance with the City of Portland's [Sustainable Paper Use Policy](#), please submit your proposal in loose leaf, unbound sets (staples are acceptable), printed on recycled paper with at least 30% post-consumer waste content. Please do not use ring binders, section dividers or any other materials which cannot be easily recycled. Double-sided printing is preferred.

Submit proposals in a sealed package or envelope clearly marked with the name of the RFP and the date and time proposals are due. PHB will not be liable for any lost or late proposals. Deliver proposals by due date and time to:

Portland Housing Bureau
421 SW 6th Ave., Suite 500
Portland, OR 97204

Questions and Requests for Clarification or Change: All requests for clarification regarding technical information, procedures, contract requirements or any other matter regarding this solicitation should be submitted **in writing** to the Solicitation Coordinator, David Sheern sheernd@pdc.us.

Restrictions on Communication: Proposers are cautioned not to undertake activities or actions to promote or advertise their proposals or to make any direct or indirect attempt to influence the Evaluation Committee members except upon invitation by PHB in a formal interview. Proposers must respond to **all** questions, comments and requests for clarification before contracts can be executed.

Evaluation, Post-Selection Review, & Finalists: PHB will convene an Evaluation Committee representing the community to assess the proposals. The Committee will evaluate proposals received by the due date and complying with RFP guidelines in accordance with RFP criteria. PHB reserves the right to waive minor imperfections or discrepancies in proposals. The Committee may invite top ranked proposer(s) to interview in person or by conference call. If so requested, the interview is mandatory and failure to meet with the Committee within a reasonable time will be grounds for rejection of the proposal. Information from the interview may be used to score proposals. The Evaluation Committee will rank the proposals and recommend the award amounts.

Negotiating Final Contracts: After PHB has issued the award decisions, it will enter into limited negotiations on selected proposals to finalize contracts including work, schedule and fees. Negotiations should be minimal and completed by the proposed Contract Execution Date, although this date may be extended at the sole discretion of PHB. If PHB determines that any negotiation has reached an impasse, it may cease that negotiation and move to the next highest-ranked proposal.

VI. PROPOSER CERTIFICATION

**Each Proposer must read and sign this section.
Failure to do so may be grounds for Proposal rejection.**

1. By submitting a proposal, proposer expressly represents it has taken no exception to any term, condition, obligation or requirement contained in this solicitation document, or any addenda to this solicitation, which is not expressly stated in its proposal.
2. Prior to contract execution, a proposer agrees to: 1) [register to conduct business in the State of Oregon](#); 2) [obtain a City of Portland Business License](#); 3) [obtain certification as an Equal Employment Opportunity \(EEO\) employer](#) through the City of Portland, Bureau of Purchases; 4) provide adequate proof of insurance; and 5) provide verification of non-profit status if applicable. Proposer agrees to maintain such certification, insurance, accreditation and/or license(s) that may be required to perform work for the duration of the contract term.
3. Proposer agrees to make the proposal a binding offer to PHB for a period of ninety (90) calendar days from the date proposals are due.

Proposer further certifies:

4. It is an independent contractor as defined in ORS 670.600 et al. and is, to the best of its knowledge, not in violation of any federal, state or local tax law.
5. This proposal is genuine and not made in the interest of, or on behalf of, any undisclosed person, firm or corporation; proposer has not induced any person, firm or corporation to refrain from proposing; and proposer has not sought by collusion or fraud to obtain for itself any advantage over any other proposer or over the Portland Housing Bureau (PHB) and Multnomah County.
6. It has no business or personal relationships with any other companies or persons that could be considered as a conflict of interest or potential conflict of interest to PHB, and that the key personnel and principals identified to perform work under an awarded contract do not have any undisclosed personal or business relationships with any of PHB's officers or employees.
7. The undersigned warrants that s/he is an authorized representative of the proposer; has read, understands and agrees to be bound by all RFP instructions, specifications, contract terms and conditions contained herein (including all addenda issued for this solicitation); that the information provided in this proposal is true and accurate; and understands that providing incorrect or incomplete information may be cause for proposal rejection or contract termination.

SIGNATURE BLOCK

Signature of Proposer's duly authorized representative:

_____ Date: _____

Printed Name and Title: _____

Legal Name of Proposer/Firm: _____

(Mandatory) Federal Tax Identification Number (FEIN or SSN): _____
