The Housing Authority of the City and County of San Francisco

ADDENDUM #1

Asset Management Consultant

#17-010-RFP-0016

March 24, 2017
I. Pre-Bid Questions: RFP #17-010-RFP-0016 (Asset Management Consultant)

1. Question: Do the MOH AMR forms referenced in the RFP accurately reflect the full and complete list of forms, or should we use those on the MOH website?
   Response: The forms in the RFP are accurate, but it is preferable to review the latest versions on the MOHCD Asset Management website (link below)
   http://sfmohcd.org/asset-management-multifamily-rental-housing

2. Question: Could SFHA provide a full and complete index of the forms required with links to each of those forms on the MOH website?
   Response: The relevant forms are listed on the webpage noted above, under the sub-header, Annual Monitoring Report Forms for Reporting Year 2016

3. Question: Does the March 16, 2017 Notice titled Notice of Availability of 2016 Annual Monitoring Report Form represent the latest information available on the format of the AMR?
   Response: The AMR has been updated for minor revision needs, the version on the webpage reflects the latest-information available.

4. Question: Will the forms being released on the MOH website on or before Friday, May 20th be different from those included in the RFP?
   Response: MOHCD has no plans to revise prior to May 20, 2017 the forms that are currently on the webpage noted above.

5. Question: Should a bidder planning to respond to this RFP plan to attend the AMR training on April 13th?
   Response: No. Attendance is reserved for project staff that are responsible for completing/submitting AMRs.

6. Question: Would SFHA provide the selected contractor a single office at its 1815 Egbert St. office large enough to accommodate 2-3 desks and a work table for the duration of the contract?
   Response: The work to be performed can completed remotely and does not require the Consultant to office at the 1815 Egbert office.

7. Question: Will SFHA be reviewing and approving all AMR documents prior to their submission to the MOH?
   Response: No. SFHA has no role in the review or approval of AMR documents.
8. **Question:** Other than the required AMR documents that must be submitted to the MOH, will SFHA require any additional documents, executive summaries or other documentary deliverables?
   **Response:** At this time, no other documents or documentary deliverables are needed. Any summarizing needs will be included within the tools that we supply to the selected consultant.

9. **Question:** Would hiring and training 1-2 residents to work onsite in an administrative capacity meet the SFHA Section 3 requirement and would that alternative be considered preferable to providing resident scholarship funding?
   **Response:** Based on MOHCD’s extensive experience with review of AMRs, there is no need to include administrative work within a proposed scope of work to be included with the part of the RFP associated with AMR reviews. The fulfillment of the Section 3 component may be through the Section 3 Scholarship Fund.

10. **Question:** It was stated at the pre-bid meeting that a contractor could choose to perform 100% of this contract remotely, is that still acceptable to SFHA and MOH?
    **Response:** MOHCD expects that the performance of the AMR review will occur remotely.

11. **Question:** How many copies are required for the Cost Proposal? Are any copies of the Cost Proposal required to be on CD or USB?
    **Response:** The RFP requires one (1) original hard copy of the offeror’s response, five (5) hard copies and one (1) electronic copy. This requirement applies to the Cost Proposal too, one (1) original, five (5) hard copies and one (1) electronic copy which needs to be submitted separately from the rest of the offeror’s response.

12. **Question:** Please confirm that it is SFHA’s expectation that AMRs for each project will be completed by the developer partner associated with that project, and the consultant’s role will be to review these draft AMRs for accuracy, and provide relevant commentary and findings based on the data.
    **Response:** Confirmed.

13. **Question:** Should the cost proposal also be included as a separate file on the electronic version of the submission materials, or only provided as a fully separate hard-copy submission in a sealed envelope?
    **Response:** The cost proposal must be submitted as a separate file on the electronic media but can be on the same media for both the offeror’s proposal and cost proposal in order to not require an additional electronic media.

14. **Question:** Has SFHA asked property auditors to complete the Supplemental Schedule of the AMR (pp. 60-64 of the RFP), or is this being filled out by developer partners for each project?
    **Response:** Project staff are responsible for making complete AMR submissions, which include audits that conform with MOHCD’s requirements that have been prepared by qualified 3rd parties.
15. **Question:** Is there a system where the reports can be uploaded?  
   **Response:** No.

16. **Question:** Is there a standard format for the reports?  
   **Response:** Yes. The AMRs must be submitted using the MOHCD-supplied forms. MOHCD will also provide tools that use standard format for recording the output from the AMR reviews to be completed by the selected consultant.

17. **Question:** Who is responsible for the accuracy of the data?  
   **Response:** The project staff are responsible for the accuracy of the data in the submitted reports. The selected consultant will be responsible for accuracy of the data created during the AMR reviews.

18. **Question:** Is construction completed in RAD Phase I?  
   **Response:** Construction is complete at 430 Turk and 939-951 Eddy.

19. **Question:** Are the sites empty/vacant?  
   **Response:** No, with the exception of 990 Pacific (Vacated for 11 months due to seismic issues), all projects are occupied during rehab.

20. **Question:** Do we need to submit the price proposal separately?  
    **Response:** Yes. See Question/Answer in #13 above.

21. **Question:** What “Certifications and Acknowledgements” are to be notarized?  
   **Response:** There are no notary requirements for your submission.

22. **Question:** How will vacancies for buildings under construction be handled?  
   **Response:** See worksheet 3 in the AMR for the instructions provided to AMR preparers about how to report information for vacant units.

23. **Question:** Is property management and developer the same company?  
   **Response:** In some cases yes, in others, no; most often they are separate but affiliated organizations.

24. **Question:** What are the project obligations related to the waterfall of payments?  
   **Response:** Information for each project’s waterfall of payments will be provided to the selected consultant prior to commencement of AMR review work.

25. **Question:** How will the cost analysis be conducted for dollars versus hours?  
   **Response:** The evaluation and selection will take into consideration not only the cost versus hours, but a variety of other factors all of which will be considered and used to determine the best overall value for the Authority.

26. **Question:** What is the best format to submit a response, hard copy or electronic?  
   **Response:** See Question/Answer in #13 and #20 above.
27. Question: Do you want a fixed price or task order quote?  
Response: The Authority will evaluate all proposal based on the criteria established in the RFP and select the firm that provides the best overall value. The intent for this RFP was to let a task order based contract with a defined term and not-to-exceed value. Provisions to extend or increase the contract will be incorporated accordingly.

28. Question: Who is responsible for determining if rent calculations are correct?  
Response: The chosen consultant will analyze the rent calculations as part of AMR Review work, and will be responsible for identifying any rent calculations that appear to be incorrect.

29. Question: Are energy efficiencies efforts/credits/etc. a factor for consideration?  
Response: No, there are no credits or energy/ESCO bonds.

30. Question: Who is paying for this contract and what funds are being used?  
Response: The Authority is funding this contract with proceeds from its RAD closings.

31. Question: Is Contractor responsible for numbers? What if they are significantly different than what is expected?  
Response: The chosen consultant will be instructed which numbers should be analyzed, and additional guidance will be provided regarding any additional steps to be taken if the numbers are significantly different than what is expected.

32. Question: Is there a list identifying the management companies and developers at each property?  
Response: Yes, this will be provided to the selected contractor.

33. Question: Where can Contractor get cross reference data for the AMR household demographics?  
Response: There is no need to cross reference any AMR household demographic data.

34. Question: Are the tools/templates protected?  
Response: Yes.
II. **Revision: 3.1 ATTACHMENT – RAD Phase I and Phase II Financial Summary**

*Shaded areas were revised or added.*

<table>
<thead>
<tr>
<th>3.1 ATTACHMENT - RAD Phase I and Phase II Financial Summary</th>
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<tbody>
<tr>
<td><strong>Closing Dates</strong></td>
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<td>Nov-15</td>
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<tr>
<td><strong>Debt and Residual Receipts</strong></td>
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<tr>
<td>Must-pay debt to SFHA on all projects</td>
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<tr>
<td>MOHCD Loans : all 0%, 55 years</td>
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<tr>
<td>SFHA Seller Carryback Loans: all at AFR, 55 years</td>
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<tr>
<td>SFHA Permanent Loan Terms: 0% interest, 55 years, not on all projects</td>
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<tr>
<td>Residual Receipts policy</td>
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<td>Lenders’ share of Residual Receipts for projects with MOHCD loans</td>
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<td>Section 1.2 of MOHCD-SFHA MOU and First Amendment to MOU</td>
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<tr>
<td>MOHCD Agreement, Definition of “Payment Date”</td>
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<td>MOHCD Agreement, Definition of “Project Fees”</td>
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<td>MOHCD Loan Agreement 12.3</td>
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<td>MOHCD Loan Agreement 12.3 or 12.4</td>
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<td>MOHCD-SFHA MOU and First Amendment to MOU</td>
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<tr>
<td>MOHCD-SFHA MOU and First Amendment to MOU; SFHA Seller Carryback Promissory Note</td>
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<tr>
<td>MOHCD Loan Agreement 10.3 OR Declaration of Restriction Covenants Article 5</td>
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<td>AMR monitoring for all projects</td>
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<td>Developer Fee</td>
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<tr>
<td>Changes to Documents</td>
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<td>Special Ground Lease terms</td>
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Failure to acknowledge this addendum in your proposal may cause for proposal rejection.

Please acknowledge this addendum by signing below and including this addendum in your submission package.

___________________________________________  __________________
Signature  Date

___________________________________________
Firm