



**INDIANAPOLIS HOUSING AGENCY (IHA)  
REQUEST FOR QUOTE (RFQ)**

**TAX CREDIT COMPLIANCE SERVICES FOR  
L and R Housing, LP and TH and B, LP**

**GENERAL DESCRIPTION**

The Indianapolis Housing Agency (IHA) owns and manages eleven (11) communities within Marion County, totaling approximately 1,800 units. IHA's mission is to provide safe, quality and affordable housing and encourages individual and family self-sufficiency. Four of its developments are located within the Regional Center (downtown) of Indianapolis, and serve elderly and disabled residents; the remaining developments serve families and are located in Center, Warren and Wayne Townships. The Agency is a quasi-governmental entity with its primary funding through HUD; it is operated independent of local government and governed by a separate board of commissioners.

Four of the eleven communities have just become Section 42 properties and will require tax credit compliance services. The communities are Blackburn Terrace 3091 N. Baltimore (243 units), Twin Hills Apartments 2210 E 36<sup>th</sup> Street (64 units), Laurelwood Apartments 3340 Teakwood Drive (135 units) and Rowney Terrace 1353 S Riley Avenue (96 units). All of the units will stay public housing along with being Section 42 designated.

L&R Housing, LP and TH&B, LP, is soliciting responses to an RFQ from firms, or individuals that are qualified to provide tax credit compliance services. Minority, Women, and Disadvantaged Business Enterprises (MBE/WBE/DBE) are encouraged to respond.

A more detailed description of the work and other requirements, provisions, specifications and instructions to responders, contract forms, quote requirements, insurance, and other documents related to the project follows in this RFQ and deemed a part of this notice and are available on the IHA website at [www.indyhousing.org](http://www.indyhousing.org) (click on "Contracting Opportunities").

A contract will be required of the successful vendor. A sample contract is referenced at [www.indyhousing.org](http://www.indyhousing.org) (click on "Contracting Opportunities"). It is suggested that serious prospective contractors provide their legal counsel copies of contract documents.

## **MBE/WBE**

It is the policy of IHA to encourage responses from MBE/WBE/DBE contractors. It is the goal of IHA to increase its MBE/WBE contractor base. All contractors that qualify are encouraged to register with the City of Indianapolis Division of Equal Opportunity at 200 E. Washington Street, City County Bldg., Suite 1500, Indpls., IN 46204. IHA has an overall goal of 15% MBE and 8% WBE participation. Contractors are also encouraged to use WBE/WBE/DBE supporting contractors in such fields as, but not limited to delivery and clerical services and other associated support.

A contractor proposing to utilize an MBE/WBE that has not been certified as such by the City of Indianapolis, Division of Equal Opportunity (DEO) shall submit a completed certification application for such MBE/WBE. The MBE/WBE must become certified by DEO to count toward attainment of the WBE/MBE goal for the project. Bidders must obtain copies of the Certification Application from DEO at Suite 1501, City-County Building, 200 E. Washington Street, Indianapolis, IN 46204. Phone is 317-327-5262; Fax is 317-327-4482.

## **SECTION 3 POLICY**

Prospective responders are advised that this project is a Section 3 covered project as described in 24 CFR 135. The omission of a Section 3 response will render the response to be non-responsive.

IHA's Section 3 Plan and Program and required forms are included on the IHA web site at [www.indyhousing.org](http://www.indyhousing.org). Responders may comply with Section 3 by providing employment and/or training opportunities to residents of IHA public housing and/or other low-income persons in the performance of this contract.

If a respondent plans to comply with Section 3 by providing employment or training opportunities to residents of IHA public housing and/or other Section 3-eligible persons, provide information regarding any hiring/training the firm will be conducting including a description of the employment/training duties, work hours, and salaries. Responders are required to submit, with their proposals, their workforce requirements for performing proposed contract regardless of whether additional hiring will be done. If additional hiring will not be done, the responder must, to the greatest extent feasible and consistent with all applicable laws, provide training to Section 3-eligible persons. Firms claiming preference as a Section 3 business concern must provide proof of your firm's eligibility for preference as a Section 3 business concern. See 24 CFR Part 135.5 for definitions of Section 3 business concerns or contact Federal Office of Fair Housing and Economic Opportunity at 800-669-9777 for additional information. Firms claiming eligibility for Section 3 preference must also submit a Section 3 compliance strategy.

## **QUESTIONS**

Questions shall be submitted in writing and e-mailed to both:

Don Bievenour, Materials and Contract Manager, [dbieve@indyhousing.org](mailto:dbieve@indyhousing.org) and  
Jacquelyne Brown, Material and Contract Specialist, [jbrown@indyhousing.org](mailto:jbrown@indyhousing.org)

Verbal questions will not receive a response. Questions and answers will be posted on IHA Website at [www.indyhousing.org](http://www.indyhousing.org) and select contracting opportunities.

Deadline for questions is 1 PM, local time, Friday, March 12, 2010. Questions received after this time will not receive a response.

## **QUALIFICATIONS OF RESPONDERS**

Responders shall be of known reputation and shall have sufficient qualified personnel and equipment to perform adequately the prescribed service as per the specification. and shall submit evidence of qualifications to meet all requirements as stated herein.

The contractor shall ensure that employees must be thoroughly trained and qualified to perform the work assigned to them. The contractor and its personnel shall not represent themselves as employees of the IHA.

## **AS EVIDENCE OF QUALIFICATIONS, BIDDERS MUST SUBMIT THE FOLLOWING INFORMATION WITH THEIR QUOTE:**

The number of years the firm has been providing tax credit compliance services, minimum of three (3) verifiable years experience.

Name(s) and contact telephone number(s) of management personnel.

Rate Schedule to include fees, profit and overhead. See Attachment B

## **INSURANCE**

A certificate of current insurance is required with each quote. The successful bidder must be able to supply certificates of insurance for the following: Minimum of one million dollars general liability and one million dollars vehicular liability and statutory requirements for workers compensation.

## **SUBMITTALS**

The following documents are posted on IHA's website at [www.indyhousing.org](http://www.indyhousing.org) and select contracting opportunities and must be completed and returned with quote:

Certificate of Non-collusive/Non-Identity of Interest Affidavit (website)  
Certificate of Non-Organizational Conflict of Interest (website)  
Certificate of Non-Segregated Facilities (website)

Certificate of current insurance; (Contractor provided)  
(3) Three References showing the names addresses and phone numbers of references that correspond to the work in this RFQ (Contractor provided).  
Quote tab sheet (with RFQ & completed by contractor)  
Section 3 Form (Either Intent to Employ or Contribution to Training Fund (Contractor provided; website)  
Current Insurance (contractor provided)  
HUD-5369-B Instructions to Offerors/Non-Construction Contract (Website)  
HUD-5369-C; Certification of Offerors, Non-Construction Contract (website, to be completed by contractor)  
MBE/WBE Certification (Contractor supplied if applicable)

The referenced forms and sample contract are posted on IHA's web-site at [www.indyhousing.org](http://www.indyhousing.org), Contracting Opportunities.

**Failure to return any of the aforementioned documents will result in the quote being declared non-responsive.**

### **QUOTE DUE DATE & RESPONSES**

RFQ responses will be accepted at the Executive Offices of IHA, Attn: Don Bievenour, Materials & Contracts Manager, 1919 N. Meridian Street, Indianapolis, Indiana 46202-1303 **until 11:00 a.m. Local Time, Friday March 19, 2010. IHA is the sole determinant of timeliness.**

An original (marked as such) and three copies of the RFQ response must be submitted in a sealed envelope and marked: RFQ Tax Credit Compliance Services, Responder's name and address shall appear on the envelope or box. Email or faxed responses are not acceptable. Submissions on or after the deadline, 3:01 PM EST, will **NOT** be accepted.

All on-time quote responses will be opened publicly and read aloud. The successful contractor will also be announced on the IHA website under "Contracting Opportunities."

### **Award**

Quote will be awarded to the most responsible and responsive contractor(s) and may be awarded to multiple contractors all to the benefit of IHA. IHA also reserves the right to discard all responses based on quantity and/or quality of responses and budgetary reasons and issue a re-quote.

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**“ATTACHMENT A”**

**TAX CREDIT COMPLIANCE SERVICES**

**SCOPE OF WORK**

Firm/Individual shall perform and carry out the duties listed below, in a satisfactory and professional manner.

1. Provide tenant qualification review for initial existing tenant certification
2. Provide tenant qualification review for new tenants
3. Provide tenant qualification for annual renewals
4. Provide on-going tenant file review for Section 42

Information for review will be sent by email from each property manager. A report from Firm/Individual will be sent by email outlining any deficiencies in the information along with corrective action to cure the defiance.

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**“ATTACHMENT B”  
BID TAB SHEET**

This sheet is to be completed and submitted as part of response.

By submission of quote response, Firm/Individual certifies that they have the necessary, labor, materials and experience to provide the requested services. Response shall be priced complete with no extras.

<b>Review of Initial tenant qualifications w/i 48 hours</b>	_____	<b>per household</b>
<b>Review of initial tenant qualification w/i 24 hours</b>	_____	<b>per household</b>
<b>Review of tenant re-certification documentation w/i 48 hrs</b>	_____	<b>per household</b>
<b>Review of tenant re-certification documentation w/i 24 hrs</b>	_____	<b>per household</b>
<b>Total Qualification Package (including obtaining verification)</b>	_____	<b>per household</b>
<b>On-going tenant file review</b>	_____	<b>per file</b>
<b>Compliance &amp; Asset Manage Training &amp; Consulting</b>	_____	<b>per hour</b>
	_____	<b>per month</b>

**Fee should include one follow-up review if additional items are needed.**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ Cellular Number: \_\_\_\_\_

Name of person preparing quote: \_\_\_\_\_

Signature of person preparing quote: \_\_\_\_\_ Date: \_\_\_\_\_

**END OF RFQ DOCUMENT 3/8/10**