

REQUEST FOR PROPOSALS

FORMS AND LANGUAGE ACCESSIBILITY

For the
**THE WASHINGTON STATE
HOUSING FINANCE COMMISSION**
Asset Management & Compliance Division

1000 Second Avenue, Suite 2700
Seattle, Washington 98104

RFP Publication Date:

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REQUESTS FOR PROPOSALS
FORMS AND LANGUAGE ACCESSIBILITY
For the
WASHINGTON STATE HOUSING FINANCE COMMISSION
ASSET MANAGEMENT & COMPLIANCE DIVISION
AMC RFP 1-2024 (WEBS)

1.1. PURPOSE

The Washington State Housing Finance Commission (the "Commission") is initiating this Request for Proposals (RFP) to solicit proposals from one or more Contractors who can initially make necessary updates and enhancements to forms used by residents and managers of affordable apartments, and later to engage in more extensive analysis and gathering of customer feedback in order to make more in-depth improvements to the forms and to translate the most pivotal forms into other languages.

The Commission *may* award more than one contract to provide the services described in this RFP.

IMPORTANT DATES

1. **Advertise date: Monday, June 3**
2. Bidders' Conference: Monday, June 17
3. **Proposal Delivery Deadline: Monday, July 8**
4. Selection of Contractor (tentative): August 30, 2024
5. Start Date of Work: Date of Contract signature
6. End Date of Phase I Work (tentative): November 1, 2024
7. End Date of Phase II Work: June 30, 2025

The RFP document and any additional amendments to the RFP will be published on both the [Commission's website](#) as well as the [Washington Electronic Business Solution for Vendors](#) (requires registration).

1.2 BACKGROUND

The Commission is a state agency that provides financing to, among others, developers/owners of affordable multifamily rental housing. Our primary financing vehicle for affordable rental housing is the federal Low Income Housing Tax Credit (LIHTC). More than 1,100 properties across the state, comprising more than 110,000 apartments, have been financed with this resource.

In accordance with federal regulations, owners of these properties sign long-term contracts with the Commission agreeing to maintain income, rent, and other restrictions at the property, properly income-qualify applicants for housing, and submit the property to regular physical inspections.

The Commission's Asset Management and Compliance division is responsible for ensuring compliance with these regulatory agreements. Our staff monitor, train and provide technical assistance to hundreds of property owners and managers statewide.

Because of the requirements of the federal program, LIHTC property owners and managers must use a series detailed forms to determine the eligibility of housing residents, both when they first apply for an apartment and regularly thereafter. They must also use certain forms to report annually to Commission staff on their compliance with their financing contract.

Unfortunately, property owners, their managers, and especially applicants and residents, of LIHTC housing are challenged by the complexity of our forms. Applicants/residents often do not understand what our forms are asking for or why, and managers frequently have difficulty explaining LIHTC program rules to participants. Some residents also have limited English proficiency. The result is confusion, frustration and misunderstandings between renter and landlord, and sometimes barriers to successfully obtaining or maintaining housing.

Recently, there was a change in some federal regulations which pertain to the LIHTC program. The Commission would like to use this opportunity to not only update pertinent forms with the new regulations, but also to simplify and increase ease of comprehension in our most frequently used forms. Therefore we are seeking assistance to first, quickly ensure the new regulations are incorporated into our forms; and then to take a more in-depth look at the users' needs and make additional improvements.

See **Appendix A** which provides a link to all compliance forms on our website for your review.

1.2. OBJECTIVES AND SCOPE OF WORK

We envision this work in two phases: After the first phase of regulatory updates and basic enhancements to our forms, phase two would involve obtaining key interested party feedback, recommending and implementing revisions, and translating the most pivotal forms into other languages.

Phase 1:

In phase one, the priority is to update key forms to reflect new compliance regulations, particularly HUD regulations pertaining to the [Housing Opportunity through Modernization Act](#) (HOTMA) and [National Standards for the Physical Inspection of Real Estate](#) (NSPIRE).

- **Review and analyze new program requirements/guidelines**, comparing with current forms to identify what language and directions need to be updated.
- **Recommend and implement improvements:** Ensure all affected forms are updated with relevant regulatory changes and ease of use for intended audiences. As much as possible, revise the forms using [standards of plain language](#). Ensure that all forms are migrated into editable, signable PDF documents.

Phase 2:

In phase two, the Contractor will employ different tools to assess the challenges experienced by residents and property managers using Commission forms. After obtaining feedback from interested parties, the Contractor will analyze the findings and present the AMC Division with recommendations for changes that would have the most positive impact on comprehension and accessibility. The Contractor will ensure the implementation of these recommendations, including translation into other languages as required.

- **Assessment and approach:** The Contractor will review the Commission’s LIHTC property portfolio and recommend a plan for engaging residents and property owners/managers to learn how specifically our forms could be improved for better comprehension. This plan should ensure representation across geography, type of property, and resident populations (senior, disabled, limited English, racial diversity, etc.) to ensure meaningful results in proportion to the overall portfolio.
- **Gathering feedback:** The Contractor will then work in concert with the AMC Division’s new Community Outreach Coordinator to gather information from interested parties. The tools and methods for engagement should include in-person and virtual focus sessions as well as other methods (such as surveys) the Contractor may recommend to gain knowledge of the issues and barriers produced by our forms. The Contractor should also keep track of feedback volunteered by participants on other subjects that, while not relevant to the current project, would be useful for our larger resident initiative strategies.
 - In addition to residents and owners/managers, this assessment should also solicit feedback from Asset Management and Compliance division staff to elicit their observations about how our forms are used and what issues arise from using them.
- **Focus group planning and facilitation:** The Contractor will work with Commission staff to co-create objectives and content of focus groups; conduct virtual and in-person focus groups; and ensure the feedback loop is closed through open communication with participating members after the engagement.
- **Data analysis:** The Contractor will compile and analyze aggregate data (individually anonymous) provided through focus groups and any other engagement efforts.
- **Report and recommendations:** The Contractor will provide Commission staff with a final report using the findings from engagement efforts that includes recommendations for ongoing engagement strategies that would have the most impact in minimizing barriers to using our compliance forms and successfully housing applicants.
- **Revise and translate forms:** Finally, the Contractor will work with Commission staff to ensure all agreed-upon accessibility and language changes are made to compliance forms. Ensure key forms are translated into identified key languages.

1.3. MINIMUM QUALIFICATIONS

Minimum qualifications include:

- Licensed to do business in the state of Washington or submit a statement of commitment that it will become licensed in Washington within thirty (30) calendar days of being selected as the Apparently Successful Contractor.
- Experience using a racial equity lens to inform work with interested parties and to identify barriers to forms comprehension and revision.
- Experience with collaborating with and supporting marginalized communities.
- Professional and responsive collaboration with previous/current clients.
- Preferred: Experience with housing providers
- Communications expertise related to simplifying and clarifying technical language to ensure it is readily understandable (in English) to audiences at all levels of literacy and education.
- Expertise in visual/graphic communications and ability to develop these when more effective than verbal/written communications.
- Five years of experience in/with community engagement that is culturally appropriate, knowledgeable, and competent.
- Capacity to work across the state to engage different interested parties.
- Five years of experience in collecting and analyzing data from community engagements efforts and using the information to recommend effective strategies to reach specific goals.
- Skills in facilitating focus groups and gathering information from community members in culturally appropriate and effective ways.
- Language skills: Ability to engage with community members in their native languages, whether through their own staff or a partner/subcontractor.
- Skills in compiling and analyzing quantitative and qualitative data using software and other tools.

1.4. BUDGET

The Commission has no specific budget target in mind for this work. The contractor will submit a proposed budget sufficient to accomplish the goals and activities outlined in this RFP.

1.5. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about to **September 1, 2024 and end on June 30, 2025**. Amendments extending the period of contract, if any, shall be at the sole discretion of the Commission. The Commission reserves the right to extend the contract for two one-year periods.

3. PROPOSAL CONTENTS

Responses must be written in English and submitted electronically to the Commission via an online submission form available at:

<https://app.smartsheet.com/b/form/f16fe666094e441093cad4329ec25f0f>

This Smartsheet submission form provides optional text boxes where you can type in responses, as well as a file upload section at the end of the form, where you can submit documents as part of your submission. No more than 10 separate documents can be submitted.

3.1. TECHNICAL PROPOSAL (SCORED)

A. Methodology

1. Describe your approach to working collaboratively with your clients and your system of project management, i.e. setting and keeping to timelines, assigning tasks, tracking multiple sub-projects, etc.

Phase 1: Please describe:

- Your experience and expertise in developing clear and effective communications for people at all levels of education and literacy using [principles of plain language](#) as described in Executive Order 23-02.
- Please describe your approach to evaluating and improving currently used communications to make them more effective.

Phase 2: Please describe:

- Your philosophy of community engagement and your considerations when designing community engagement strategies.
- The specific ways in which you engage community members to share their perspectives.
- How you would ensure the following during the design and delivery of community engagement:
 - Ensuring inclusion and equity
 - Protecting BIPOC staff
 - Ensuring full participation/engagement
- How you collect and analyze quantitative and qualitative data from engagement efforts. Describe the tools such as software you typically use for this work.

B. Capacity and Experience

1. Either Phase: Please describe one to three examples of your most comparable work performed during the past two years and include the following:
 - Name of the entity and date of engagement

- Person to whom you were responsible and phone/email contact info
 - Personnel from your firm who worked on the engagement
 - An overview of your work and the outcomes achieved.
2. Please describe your firm's capacity, experience and expertise in the following areas. Be as specific as possible.
 3. References: If not otherwise listed above, please provide the names, titles, organizations and contact information for three references who can speak to your work and capacity as a trainer and facilitator.

Phase 1:

- Developing effective communications for customer audiences of many backgrounds and education levels.

Phase 2:

- Assessing the goals of community engagement and designing an effective and culturally appropriate approach to achieve the goals.
- Engaging directly with community members to gather feedback in a range of ways
- Ensuring that the feedback loop is closed through open communication with participating members after the engagement.
- Collecting and analyzing quantitative and qualitative data.
- Providing recommendations, based on findings from the engagement, that can guide the development of effective strategies.
- Experience in getting forms or other documents translated into different languages.

C. Personnel

1. Please describe the **roles and responsibilities of personnel** who would be assigned to work with the Commission to develop and deliver staff training. Include all **relevant information** including their expertise, training, lived experience, previous work, etc.
2. Describe any **partnerships with other individuals or firms**, including subcontracting relationships, that would be required to successfully complete this project. Please note if any proposed subcontractors are certified by the Office of Minority and Women's Business Enterprises.

D. Work Samples

Please share **two to four examples** of prior work relevant to the different phase(s). Links to online materials and narratives preferred. If incorporated into the submission PDF, please limit to 5 pages of narrative and 10 pages of sample materials. Sensitive information can be omitted or obscured.

Examples could include:

- At least one example of similar work to that described in this RFP, including the project's objectives, your approach and activities, and the results.
- Before and after samples of communications that you edited to be more accessible, clear, and/or effective.
- Materials from previous community engagement effort(s).
- Other relevant examples of your work.

3.3. COST PROPOSAL (SCORED)

The evaluation process is designed to award this procurement not necessarily to the Contractor of least cost, but rather to the Contractor whose proposal best meets the requirements of this RFP. However, Contractors are encouraged to submit proposals which are consistent with state government efforts to conserve state resources. If selected through this RFP, the Contractor will submit a fully detailed budget including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Contractors are expected to bill the Commission no more than monthly for all expenses accrued in the previous 30 day period. Contractors are required to collect and pay Washington state sales and use taxes, as applicable.

Please provide an estimated budget based on the following (**PLEASE NOTE - These numbers are only to assist us in comparing costs across proposals and do not represent our expectations for the number of hours of actual work**):

Indicate the number of hours you would estimate for the work and the hourly rate for the required staffing, indicating which would be performed by subcontractors. A range of hours or rates is acceptable as long as the range is narrow, i.e. between 10 and 20 hours rather than between 10 and 40 hours. Please include enough information so we can follow your assumptions and reasoning.

Phase 1:

1. Reviewing and editing documents. For purposes of estimating costs only, assume 20 separate documents (see **Appendix A**).

Phase 2:

1. Developing an effective engagement strategy for a representative sample of the Commission' portfolio of 1,100 properties and 110,000 households.
2. Directly engaging residents and property managers. For purposes of estimating costs only, assume five in-person focus groups in different areas of the state and five virtual focus groups, engaging 12 attendees each.
3. Compiling and analyzing data
4. Providing report and recommendations
5. Estimated travel or incidental expenses.

3.4. RELATED INFORMATION (MANDATORY)

- A. If the Contractor has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as notice to stop performance due to the Contractor's non-performance or poor performance and the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.
 - A. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Contractor's position on the matter. The Commission will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the Contractor in the past five years, so indicate.
- B. Has the Contractor, within the past three-year period, been determined by a final and binding citation and notice of assessment issued by the department of labor and industries or through a civil judgment entered by a court of limited or general jurisdiction to have willfully violated, as defined in RCW 49.48.082, any provision of chapter 49.46 (Minimum Wage Requirements and Labor Standards), 49.48 (Wages—Payment—Collection), or 49.52 (Wages—Deductions—Contributions—Rebates)?

3.5. REFERENCES (MANDATORY)

List names, addresses, telephone numbers, and e-mail addresses of three (3) business references for the Contractor, for contracts the Contractor has performed in the last five years, if any, and three (3) business references for the lead staff person for whom work has been accomplished and briefly describe the type of service provided. Do not include current Commission staff as references.

By submitting a proposal in response to this RFP, the Contractor and associated team members grant permission to the Commission to contact these references and others, who from Commission's perspective, may have pertinent information. The Commission may or may not, at its discretion, contact references. The Commission may evaluate references at its discretion.

3.6. OMWBE CERTIFICATION (OPTIONAL AND NOT SCORED)

Include proof of certification issued by the Washington State Office of Minority and Women's Business Enterprises (OMWBE) if certified minority-, women-, veteran-owned or small business firm(s) will be participating on this project. For more information please visit: www.omwbe.wa.gov.

4. EVALUATION AND CONTRACT AWARD

4.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team(s), to be designated by the Commission, which will determine the ranking of the proposals.

The Commission, at its sole discretion, may elect to invite the top-scoring firms as finalists for an oral presentation.

The RFP Coordinator may contact the Contractor for clarification of any portion of the Contractor's proposal.

4.2 SCORING BREAKDOWN

The following points will be assigned to the proposal for evaluation purposes:

Methodology	20
Capacity/Experience	20
Staff Qualifications	10
Work Samples	20
Cost Proposal	30
Total	100

AWARD

Based on final scores, the Commission may choose **one or more** contractors to enter into contract negotiations, or may select finalists for a final round of evaluation and selection, possibly including interviews.

The Commission reserves the right to award the contract to the Contractor(s) whose proposal is deemed to be in the best interest of Commission and the State of Washington.

APPENDIX A

Please review Commission's compliance website to learn more about the Asset Management & Compliance team and what we do:

<https://www.wshfc.org/managers/index.htm>

The compliance forms filled out by residents in Commission-financed housing are located here:

<https://www.wshfc.org/managers/forms-RC.htm>

The forms in need of review are under the following sections on this page:

REQUIRED ELIGIBILITY FORMS

ADDITIONAL REQUIRED FORMS

INCOME

ASSETS

STUDENTS

MISCELLANEOUS

Note that most of the forms are also accompanied by Instructions.