Request for Proposals (RFP)
American Rescue Plan Act (ARPA)
Coronavirus State and Local Fiscal Recovery Funds (CSLFRF)
for Affordable Housing Development

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1.0 General Information

1.1 Introduction

Oklahoma County Home Finance Authority (the "Authority") announces the availability of federal funding under the American Rescue Plan Act (ARPA) Coronavirus State and Local Fiscal Recovery Funds (CSLFRF) to facilitate a localized response to negative socioeconomic impacts resulting from the COVID-19 pandemic. The Board of County Commissioners of Oklahoma County allocated $2.0 million to increase the number of units of affordable housing available within Oklahoma County. Due to a failure of a project, the Authority has the approximate amount of $250,000 to support additional housing development. The Authority will administer the use of funds described in this RFP.

1.2 Timeline

The table below outlines the intended schedule for the initial round of funding. Schedule is subject to change.

Milestone	Responsibility	Deadline
Call for Proposals Opens	Authority	Wednesday, August 20
Submit Written Questions	Responder	Tuesday, September 2 at 3:00 p.m. CST
Responses to Questions Posted on Website	Authority	Wednesday, September 3
Submit Proposal	Responder	Monday, September 15 at 3:00 p.m. CST
Proposal Evaluation	Authority	Wednesday, September 24
Contract Awards	Authority	Expected award date is Wednesday, September 24 though a special meeting may be called to further discuss proposals
Contract Effective Date	Authority	To be determined, based on timing of award
Deadline to Expend Funds	Responder	Expended by 06/30/2026

1.3 Proposal Contents

The proposal must include a detailed scope of work. At a minimum, the Responder's response should address the priorities outlined in Section 2.0 Scope of Work, required information in Appendix A: Proposal Submission, and additional documents deemed necessary by the Responder. Prior to submission, Responders should review all SLFRF program requirements as well as other relevant federal, state, and local policies.

1.4 Responder Questions

Please direct all questions to David Feisal at dfeisal@ochfa.org by the above deadline and reference the applicable section/question numbers in your request. Staff will issue an addendum to this RFP and post responses to questions on the Authority's website at https://www.oklahomacounty.org/departments/ochfa. In addition, the Responder must be available and able to present the proposal to the Authority trustees if requested.

1.5 Proposal Submission

Organizations must submit one (1) electronic copy their proposal to dfeisal@ochfa.org prior to the deadline for submission outlined above.

1.6 Public Records

Upon receipt by the Authority, each proposal becomes the property of the authority and is considered a public record. Proposals will be reviewed by the Authority's Trustees, as well as other Authority staff and members of the general public who submit public record requests after a selection result has been announced to the public.

1.7   Cost of Proposal Preparation

The Authority shall not be liable for any expenses incurred by any Responder responding to this RFP. Firms submitting a proposal in response to this RFP agree that the materials and submittals are prepared at the firm's own expense with the express understanding that the Responder cannot make any claims whatsoever for reimbursement from the Authority for the costs and expense associated with preparing and submitting a proposal. Each Responder shall hold the Authority harmless and free from any and all liability, costs, claims, or expenses incurred by, or on behalf of, any person or Responder responding to this RFP.

2.0 Scope of Work

2.1 Eligible Activities

Authority will fund eligible activities in accordance with the ARPA/CSLFRF Final Rule and as outlined in this RFP. Proposals must address how the eligible activities will respond to the negative impacts of COVID-19 and ensure the needs of impacted residents are met with an equitable outcome.

Proposals are being solicited for the following Eligible Activities:

- New construction of affordable and attainable housing (single-family or multifamily)
- Acquisition and rehabilitation to preserve affordable and attainable housing (single-family or multifamily)
- Conversion of an existing structure from another use to affordable rental housing
- Demolition as it relates to the new construction, acquisition, or rehabilitation of above.
- Project-related soft costs as reasonable and necessary (e.g., architecture, engineering)

*Note: Responders are responsible for identifying operating and supportive services funds, reserve fund, rental assistance, or another source; however, this is not guaranteed.

2.2 Priority Populations

By definition, "affordable housing" means that no household pays more than 30 percent of its income on rent and utilities. Per CSLFRF guidelines, affordable housing must benefit one or more of the disproportionately impacted populations and communities as defined below:

- Households and populations who live in one of Carrboro's two qualified census tracts (QCTs).
- Low to moderate income households, meaning 60% or below the area median income.

Units must remain affordable for a minimum of 20 years.

3.0 Method of Award and Proposal Evaluation Process

3.1 Method of Award

All awards will be made to private nonprofit organizations or public entities. The award will be formalized through the negotiation of a loan agreement and other supporting documents to appropriately document the requirements and restrictions in the ARPA guidelines. The Authority will subordinate to other private lenders to provide for maximum flexibility for transaction structuring. Specific terms of the subrecipient grant agreement will be determined by the ARPA Final Rule and the Development Agreement.

Proposals will be automatically rejected for any of the following:

- Proposal is late, incomplete, contains ineligible activities, or does not meet the submission requirements.

- Proposal includes false, misleading, or inaccurate information.

- Responder is not in good standing with local governments.

- Responder has unresolved monitoring issues or has been found to be in noncompliance with any federal, state, or local grant or loan program requirements in the last five (5) years.

All grant funding will be paid on a reimbursement basis. [All project funds must be obligated and expended by the deadline listed In Section 1.2: Timeline. In addition, if development on a funded project stalls, the Authority reserves the right to reallocate funding to meet other CSFLRF activities to meet spending deadlines.

3.2 Proposal Evaluation Criteria

Proposals will be evaluated according to completeness, content, and experience with similar projects, ability of the Responder, and cost. Proposals that satisfy proposal requirements will be evaluated according to the following criteria with the indicated weights. Proposals must score at least 75 points to be considered for funding.

Criteria	Description	Weight
Quality of Development	Safe, high-quality, affordable housing development that compliments the community, existing assets, and neighborhoods and serves eligible and priority populations.	15
Financial Feasibility	Sources and uses of funds should be identified and be efficient in use of SLFRF funds. The proforma should be reasonable and include contingencies as expected or necessary.	15
Development Capacity and Experience with Federal Funds	Proposals should showcase extensive affordable housing experience, especially serving people experiencing homelessness, with projects that were delivered on-time and on budget.	10
Community Impact	The development must demonstrate a positive impact on the community.	20
Community Participation	Responders must demonstrate how they will partner with community organizations, local partners, and service providers.	10

Criteria	Description	Weight
Economic and Community Inclusion	The Oklahoma County Home Finance Authority is committed to promote full and equal business opportunity for all businesses to supply the goods and services needed to support the mission and operations of the Authority. The project should also adhere to Section 3 (HUD) requirements to establish stronger and more sustainable communities as outlined on the Department of Housing and Urban Development's website on https://www.hudexchange.info/programs/home/section-3/.	15
Project Readiness	To ensure timeliness, Responders should provide evidence of site control, appropriate zoning/plans for zoning change, preliminary project design, community support, secured financing arrangements, supportive services and compliance with environmental regulations.	15
Total Score		**100**

The Authority reserves the right to reject any and all proposals for any reason. The Authority may fund only part(s) of a proposal and award less than the requested amount.

4.0 General Terms and Conditions

4.1 Responder Requirements

It is the responder's responsibility to read this entire document, review all enclosures and attachments and comply with the requirements specified herein. Organizations must be prepared to execute a Development Agreement that meets the SLFRF program requirements and adheres to local, state, and federal laws. Please refer to Exhibit B: Relevant Policies and Guidelines.

Development applications must be site-specific as funds cannot be committed without an address. Responders may not undertake any physical or choice-limiting actions, including but not limited to property acquisition, demolition, movement, rehabilitation, conversion, repair, or construction until satisfactory completion of an environmental review, evaluation by Authority staff, and a Development Agreement has been executed.

4.2 Monitoring and Reporting

Authority will conduct a risk-based assessment for monitoring and reviews in accordance with the U. S. Treasury's Final Rule and Compliance and Reporting Guidance. Responders are advised to view the guidance for additional information specific to eligible uses in reporting, required programmatic data, project expenditure reporting requirements, and any other required information as well as applicability of the OMB's Uniform Guidance. The Authority may include additional reporting requirements in alignment with Audit, Budget and Risk Management, and/or Community Development needs and objectives, including any extension of the affordability and/or compliance period as detailed in the Development Agreement.

Responders must cooperate fully in any review conducted by Authority representatives, and/or the federal government. If it is determined by the Authority that corrective action(s) must be taken, the Authority will request a written Corrective Action Plan (CAP) detailing actions that will be taken to remedy the deficiencies.

Exhibit A | Project Application and Required Attachments

The proposal must include a detailed scope of work. At a minimum, the scope of work should include all information requested in the following sections, and any other information the Responder deems relevant.

Cover Sheet

Organization Legal Name	
Organization Unique Entity Identifier (UEI)	
Organization Tax ID #	
Organization Physical Address	
Organization Mailing Address	
Organization Website Address	
Contact Name, Title	
Contact Email	
Contact Phone	
Project Name (name of development)	
Project Type	
Project Description *(100 words or less)*	
Project/Development Address	
Project Proposal Submission Date *(mm/dd/yy)*	
Total Project Cost	$
Total Amount of CSLFRF Funds Requested	$
# of Housing Units (Total Units/CSLFRF Funded Units)	

A. ORGANIZATION PROFILE

1. Describe your organization's mission in 250 words or less.

2. Identify your organization's type (e.g. for-profit, non-profit, government, etc.).

3. Provide names of staff, contractors, and/or volunteers that will be involved with the project. Describe their responsibilities with the project and experience with successful completion of similar projects in the past.

    a.   # of FTE – Full-Time Paid Positions:
    b.   # of FTE Part-Time (less than 40 hours/wk) Paid Positions: _____
    c. # of Volunteers

4.   Qualifications and History of Success
    a.   Describe three (3) relevant and substantially similar affordable housing development or preservation projects completed by the organization in the last 5-10 years. The project description should include:
         i.   Location
         ii.   Scope and scale of project
         iii.   Total development budget and financing sources
         iv.   Indication of whether the projects were completed on budget and on time. If not completed on budget and on time, please describe why.
         v.   Photos/illustrations of completed project

    b.   If you have received Authority funding within the last 5 years, please provide the following for each project:
         i.   Location
         ii.   Scope and scale of project
         iii.   Total development budget and financing sources
         iv.   Indication of whether the projects were completed on budget and on time. If not completed on budget

    c.   Provide a summary of experience with federal grants including but not limited to; financial management; Uniform Guidance; knowledge of, and compliance with state and federal ethics rules; identification and reporting of waste, fraud and abuse; and oversight of disbursement and tracking of federal funds by state or federal agencies.

    d.   If available, provide contact information for professional references whom the Authority may contact regarding the proposer's services.

B. PROJECT INFORMATION

1. Project Profile	*Insert project information below*
Location *(insert address)*	**Oklahoma County Qualified Census Tract** ☐ Yes ☐ No
Size *(insert acreage of development site)*	
Development Type *(select one)*	☐ New construction of affordable and attainable housing (single-family or multifamily) ☐ Acquisition and rehabilitation to preserve affordable and attainable housing (single-family or multifamily) ☐ Conversion of an existing structure from another use to affordable rental housing ☐ Demolition as it relates to the new construction, acquisition, or rehabilitation of above. ☐ Project-related soft costs as reasonable and necessary (e.g., architecture, engineering)
Total Number of Units	

	# of Total Housing Units	# of Bathrooms	Square Footage	Proposed Rent or Sale Price Per Unit	Projected Cost Per Unit Including Utilities
Studios					
One-bedroom					
Two-bedroom					
Three-bedroom					
Four-bedroom					
Area Median Income Served *(insert # of units by AMI)*					
<30%					
31-60%					
61-80%					
81-100%					
>100%					

Target Population *(check all that apply)*	
	☐ Families ☐ Older Adults (Age 62+) ☐ Disabled ☐ Homeless ☐ Veterans
	☐ Other (specify)
ADA Accessibility *(insert # of total units)*	
Total Development Cost Per Unit	
Per Unit Subsidy	$ _____ / unit
Debt Coverage Ratio (DCR)	Lowest DCR _____ Highest DCR _____
Authority Planning Approvals Received *(as of the date of application)*	☐ Yes ☐ No ☐ NA

2. **Project Description and Justification**

   a. Provide a general overview of your project, including what you are planning to produce (100 words or less).

   b. Describe and explain how and why the project qualifies for CSLFRF funding and specify how the project is a program or service that addresses housing insecurity, or a lack of affordable housing suffered by the eligible population.

3. **Project Location**

   a. Identify current zoning and any anticipated zoning relief required.

   b. Current Ownership: if acquisition will be required by the proposer, information related to how the property will be acquired including, but not limited to, anticipated acquisition price, feasibility and/or conditions that would be tied to acquisition, and acquisition time frames.

4. **Affordability**

   a. Identify the length of the project's affordability terms (20 year minimum).

   b. Describe any methods to ensure long-term affordability of housing units, including subsidy recapture, equity sharing, deed restrictions, etc.

   c. Explain your agency's marketing process to ensure an adequate pool of income-eligible renters to buyers.

   d. Describe any supportive services, if any, that will be provided through this project.

5. **Project Financing**

   a. Description of the financing arrangements required for the proposal and time frames for securing all necessary funding. Indicate which funds are committed or pending and include the percentage of committed funds toward this project.

   b. A description of any equity and/or other funding sources brought to the project by the proposer.

   c. If applicable, provide a description and explanation of how any funds granted by the Oklahoma County Home Finance Authority will be used to leverage receipt of additional funding or will be partnered with other sources of funding and equity.

   d. If applicable, provide a copy of the property's appraisal.

6. **Construction**

   a. Description of the construction requirements for the proposed project.

   b. Proposed construction schedules for the project.

   c. Description of how the proposed use relates to the existing community/neighborhood features, including onsite amenities and distance to public transit, high quality schools, grocery stores, parks, and services.

   d. Describe the use of energy efficient principles, universal design, and/or materials with extended life span.

7. **Community Partnerships**

   a. Description of all proposed community partnerships, including time frames and/or schedules for the partners to begin working with one another.

   b. Description of any proposed community/neighborhood engagement to facilitate support for and/or to determine opposition to the project.

   c. Description of how intended beneficiaries of the proposed project will be involved in the planning and design process (in 100 words or less).

8. **Social Equity**

   a. Describe whether your project subject to any policies that restrict any external funding sources for rent, security deposits, and/or other tenant costs (e.g., Emergency Housing Assistance, Housing Choice Vouchers, Rapid Re-Housing, family contributions, etc.). If yes, please explain what will not be accepted and why.

      a. Identify whether or not the project will accept all types of housing vouchers (i.e., HCV, EHV, RRH, PSH, etc.)? If not, explain which type(s) of housing voucher will be accepted and why? do you not accept and why?

   b. Describe how the project will address health and education disparities, increase access to opportunity, and build a stronger community through an investment in the neighborhood, especially to Oklahoma County Home Finance Authority residents that have been negatively impacted in the past, due to inequity.

   c. Complete the below questions and provide any additional context on the racial composition of the organization and board leadership:

      i. % of staff that are people of color: _____

      ii. % of board that are people of color: _____

      iii. % of staff that have attended racial equity training: _____

   d. Describe your organization's racial, equity and inclusion goals and any recent training activities.

   e. Please describe any additional activities your organization is doing to address racial equity.

9. **Risk Assessment**

   a. Identify any and all anticipated obstacles to successful completion of the project and describe your plan to overcome those obstacles.

   b. Provide description of any and all municipal requests or requirements (including permitting and inspections) that might be needed in order to overcome any and all such obstacles and/or facilitate the timely completion of the project on or before the project expenditure deadline stated in the RFP Timeline.

10. **Proposed Measurement Tracking:** As there are no prescribed methods of reaching the goals outlined in this RFP, the proposal should include the proposer's suggested performance measures in line with the proposed project that achieve compliance with CSLFRF guidelines.

C. REQUIRED ATTACHMENTS

1. **Financial Audit**
   Please include your organization's most recent financial audit.

2. **Completed W-9 Form**

3. **Organization Budget**
   Please submit an organizational budget. Among other relevant revenue and expenditure information, please include line items on any government grants or loans by jurisdiction. If your organization has run a deficit, please include that information here.

4. **Project Financials**
   Please submit the following information about the project in a Microsoft Excel document, as relevant:
   a. Project Budget/Development Costs
   b. Sources and Uses
   c. Operating pro forma (rental projects):
      i. must show 20+ year cash flow projections that includes documentation of key operating assumptions, estimated rental income, operating expenses, net operating income, and any anticipated debt service, including a separate line item for any debt service (principal and/or interest) associated with Authority loans requested as part of this application. Pro forma should project expenses far enough out to show when debt service ends (i.e., more than 20 years if necessary). Applicants may use the attached template or a similar version of their own.
      ii. Rental Income Breakdown: must show rent and utilities by bedroom size and AMI level, using the attached template or something similar.
   d. Housing Affordability and Sale Proceeds (homeownership projects): must show sales price by bedroom size and AMI level and mortgage sources and amounts, using the attached template or something similar. If the applicant is the lender, also include the mortgage amortization schedule.

5. **Articles of Incorporation**

6. **List of Board of Directors**
   Provide the following information about each board of director's member: name, occupation or affiliation of each member, officer positions, gender, race/ethnicity.

7. **Market Analysis**
   Proposals should provide a market analysis specific to the property.

8. **Project Information**
   a. For all projects, please submit a detailed timeline showing when each work task will be completed over the duration of the project. Please include when you plan to expend the Authority's funding for the project. For ARPA funding applications, project funding must be expended by 06/30/26.
   b. Submit the rental income policy that will be used for the project
   c. Submit the background check policy that will be used to screen potential tenants
   d. For development and renovation projects, please submit the following:
      i. Site map showing lot boundaries, locations of structure(s), and other site features
      ii. General location map (at least ½ mile radius)
      iii. Floor plan(s)
      iv. Elevation(s)
      v. Property Appraisal

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vi.   Evidence of zoning compliance

vii.   Map showing proximity to bus stops, grocery store, schools and other amenities (including distance in miles from project site and amenities)

9. IRS Federal Form 990

A copy of the organization's most recent Form 990 is required for nonprofit applicants. The specific form depends upon the organization's financial activity. Review the IRS' table guide, for more details. For Form 990-N (e-postcard) filers, include a copy of the postcard, with the organization's application materials. If Form 990 filings are not current, please explain.

10. IRS Federal Tax-Exemption Letter

A copy of the organization's **current** IRS tax-exempt letter that confirms its nonprofit status is required.

D. SUPPLEMENTAL ATTACHMENTS

Responders are encouraged to include additional information such as maps, site plans, elevations, photos, qualitative and quantitative data. List the supplemental files that are being submitted with this proposal below.

1. Form of Compliance Documents