



City of Phoenix Housing Department

RFP FY22-086-03

Accounting Services – Affordable
Housing Audit

Pre-Offer Conference Meeting
October 21, 2021 @ 3:00 pm



Questions and Answers (Q&A)

- Questions only
 - Email question(s)
 - Some answers available today
 - Answers will be published on City's website
- Written answers supersede verbal responses



Q&A Deadlines

- Submit written questions by October 28, 2021 @ 9:00 am (Phoenix Local Time)
 - Email: chuck.garvey@phoenix.gov
- Answers expected to be available at <https://solicitations.phoenix.gov/>



RFP Deadline



Important
Date!

Thursday, November 9, 2021

1:00 p.m.

Phoenix Local Time

Late offers will be rejected

The prevailing clock will be the Department clock. **The date and time on the email will provide proof of submission and verification if the bid was received on or prior to the Due Date and Time specified. Please identify the solicitation number on the subject line of the email when submitting your offer.**



RFP Deadline

Important
Date!

Section I – Instructions, Item 12 on how
to **Submission your Offers**

Section VII – Submittal Locations via
Physical or Electronic



Contract Terms

- Five-year contract term
 - Period begins on or about July 1, 2022
 - City reserves the right to award to one or more contractor



Qualifications Threshold Criteria

- Entity must have (3) three years minimum experience in normal business activity.
- Be an entity that is not on the GSA suspension, debarment and HUD debarment list.
- Experience completing financial audits and federal and state tax returns for affordable and or LIHTC properties.
- Offeror must provide evidence of all licenses, certifications and other evidence of qualification for this type of service.



Qualifications/Evaluations Criteria

- **Project Understanding and Approach** 400 points
How your firm will approach this type of services.
Experience and methodology listed in Scope (Services)
Experience and methodology listed with tax filings, auditing and reports
Experience and methodology listed (HUD and Other Submissions)
- **Qualification and Experiences** 400 points
Audit Firm peer review
Management Component
Technical Component



Qualifications/Evaluations Criteria

- Fee and Costs 200 points
 - Five year/annual Cost

- Total Points 1000



Content of Response

CONTENT OF RESPONSE:

- The Offerors' response will include the following (detailed in
- Qualifications/Evaluations Criteria section) **Pages 18**



Terms and Conditions

- Section II – Standard Terms and Conditions
- Section III – Special Terms and Conditions



Indemnification and Insurance

- Section IV – Insurance and Indemnification
 - City as additional insured
 - Required at the time of award



Section V - Mandatory Federal Clauses

COMPLIANCE WITH ALL FEDERAL REQUIREMENTS

**FORM HUD-5369-B AND HUD-5369-C INSTRUCTIONS TO
OFFERORS NON-CONSTRUCTION:**

**FORM HUD-5370-C GENERAL CONDITIONS FOR NON-
CONSTRUCTION CONTRACTS SECTION I (WITH OR WITHOUT
MAINTENANCE WORK**

**FORM HUD-5370-C GENERAL CONDITIONS FOR
NON- CONSTRUCTION CONTRACTS SECTION II (WITH
MAINTENANCE WORK):**



Section V - Mandatory Federal Clauses

- **NONDISCRIMINATION IN EMPLOYMENT:**
- **ELIGIBILITY**
- **HUD Form 2992:**
- **IRC § 42, Low-Income Housing Credit**



Scope of Work - Introduction

- The Housing Department is seeking qualified entities that have experience with tax credit audit and accounting services programs. Entities responding must have experience in AFFORDABLE HOUSING PROJECTS activities and must be able to work closely with the Housing Department staff in implementing and carrying out in addition, entities must have sufficient experienced staff and the ability to leverage other resources.
- Audit Reporting
- List of Affordable Properties



Submittal for RFP

Submittal Package:

Section I – Instructions, Item 12 – Submittal of Offer.

A. Physical: City of Phoenix, Housing Department, Calvin Goode Building, 4th Floor, Phoenix, AZ 85003 - Please submit one original, three copies, and four electronic copies (Jump Drives) of the Submittal Section and all other required documentation.

OR (Do not do both)

B. Electronic: Please submit one electronic copy through e-mail to chuck.garvey@phoenix.gov of the Submittal Section and all other required documentations.



Offer Submittal Format

Submittal Package:

- Typewritten for ease of evaluation;
- Signed by an authorized representative of the Offeror;
- Submitted with contact information for the individual(s) authorized to negotiate with the City;
- Submitted with a table of contents and tabbed per the following major sections:
 - Tabs 1 to 15



Offer Submittal Format

Submittal Package continue:

- Costs and Payments
- Offer
- Bid Price Schedule
 - Spreadsheet by location
- Place of Business
- References
- Certification (Federal)

-This program is under the United States Department of Housing and Urban Development (HUD). Proposers must be registered at SAM.gov for award of the contract.



Questions

- Submit additional questions by email
October 28, 2021 @ 9:00 am
(Phoenix Local Time)
 - Email: chuck.garvey@phoenix.gov



Transparency Policy

City Code 43-36

All respondents and their representatives under penalty of disqualification will refrain from contacting anyone involved in this process other than the procurement officer.