



Request for Qualifications – Resident Coordination and Facilitation

Release Date: May 19, 2023

Bids Due: June 2, 2023

Submit Proposals: Email to Nsalerno@rocusa.org

Contract term: Contract start date through September 2023 (with potential extension)

OVERVIEW

ROC USA® is seeking a Contractor(s) who can perform the following:

ROC Development

With Project Management support from ROC USA:

- Provide on-site support to homeowner residents of a manufactured home community in San Antonio, TX as they pursue resident ownership of the land through property acquisition.
- Build affinity and mutual trust with organized residents and help establish a cooperative and non-hierarchical relationship between ROC USA and the future resident-owned community.
- Organize and facilitate weekly resident meetings and Board meetings during the pre-purchase process. Translate and transcribe meeting notes and materials, when needed.
- Assist the community with development and support to review and understand the transaction, ownership model and operating plans necessary to complete acquisition of the manufactured home community and take on the venture of resident ownership

Outreach and Partnerships

- Foster and build connections with key stakeholders with partner organizations in the area, i.e., housing advocates, nonprofit organizations, and other entities that support manufactured home communities, along with the Board.

Administrative

- Comply, in a timely manner, with requests for information, tracking data, generating reports, delivering documentation, and undertaking other related tasks to ensure prompt closing of loan or grant commitments and timely reporting.
- Follow process checklists and adapting process to circumstances.
- Attend weekly meetings and provide ongoing updates to the Cooperative Solutions Service Unit.

Under this invitation, ROC USA is soliciting responses of qualifications from all interested and qualified entities (independent contractors, consortia of contractors and/or vendors) to coordinate ROC USA's efforts with homeowners and residents of Riverside Terrace in San Antonio, TX. This opportunity would be the local presence that is necessary to gain the trust of homeowners and build a long-lasting strong relationship between the community and ROC USA.

ABOUT ROC USA

ROC USA is not your typical affordable housing organization. We are a not-for-profit social enterprise with a mission to make quality resident ownership viable and successful nationwide and expand economic opportunities for homeowners living in MHCs.

Resident ownership is achieved when homeowners in MHCs) form a co-op and acquire the underlying land from a commercial owner. To make ownership possible, **ROC USA** creates purchase opportunities through market development in industry and negotiations with investor-owners, provides training and technical assistance through both a network of 10 non-profits (CTAPs) and a national team in states not served by a CTAP. ROC USA also provides financing through **ROC USA Capital**, a \$500 million dollar national Community Development Financial Institution (CDFI).

ROC Association is the association of resident owned communities (ROCs) supported by ROC USA. Its purpose is to support a strong peer network of co-op leaders and advocate for and represent ROCs on the ROC USA Board of Directors and with stakeholders across the country.

Today, ROC USA represents over 300 ROCs and more than 21,000 Member-owners in 21 states. By 2028, we expect to serve more than 30,000 Member-owners. For more details see www.rocusa.org.

Riverside Terrace Opportunity

Riverside Terrace residents have a unique opportunity to become a resident-owned community (ROC), where the homeowners form a non-profit business called a cooperative. Each household is a member of the cooperative, which owns the land and manages the business that is the community. Members continue to own their own homes individually and an equal share of the land beneath the entire neighborhood. There are many benefits to living in a ROC, including:

- Control of monthly lot rent, community repairs and improvements,
- Lifetime security against unfair eviction, and,
- Liability protection and a strong sense of community.

This will ensure everyone in the community has a say in the way a ROC is run, and major decisions are made by a democratic vote. Members elect a board of directors, which appoints committees to carry out various tasks and manage the day-to-day operations of the organization. For more information on what is a ROC, check out this video ([English](#) or [Spanish](#)).

STATEMENT OF WORK

ROC USA seeks a Contractor to act as the liaison between ROC USA and the homeowners of Riverside Terrace. The Contractor will support our work with facilitating the cooperative ownership and democratic self-governing of the manufactured home community in San Antonio, TX. The Contractor will work closely with the Vice President of Acquisitions and the Cooperative Program Manager in Cooperative Solutions, a Service Unit in ROC USA.

The purpose of this invitation is to select a qualified Contractor to provide these services in Spanish. The following describes the scope of services and performance standards that the selected Contractor will be expected to meet.

Experience and demonstrated success in providing the full scope of language assistance services within the community development context is a plus.

General Expectations

- a. Flexible hours are required, depending on the request. In addition to providing service during normal business hours, some evening and weekend assignments may be required.
- b. Services are required in San Antonio, TX. The Contractor should be in the surrounding area.
- c. Contractors must have a high skill-level, bonus if trained and certified according to professional and ethical standards and experience, in working with community leaders and residents from diverse backgrounds. The response to this invitation should include a description of training and/or professional certifications in translation, transcription, facilitation, or similar services related to this invitation.

Description of Scope of Work

The Contractor will be responsible to achieve the following:

- Provide direct support to the residents in the manufactured home community as they pursue land ownership through property acquisition. This would require weekly meetings with residents and members where the Contractor will organize residents, communicate expectations, facilitate Board meetings and association, interpret, and translate, and other activities related to the meetings.
- Provide administrative support with requests for information, tracking data, generating reports, delivering documentation, and undertaking other related tasks to ensure prompt closing of loan or grant commitments and timely reporting.
- Attend weekly meetings with ROC USA staff for coaching and assistance, ongoing updates and report outs.

Anticipated up to 20-25 hours weekly, or 300 hours in total over the period of the contract.

The awarded Contractor(s) must be:

- **Fluent in Spanish** and can translate, transcribe, and interpret from English to Spanish.
- **Expert in Project Management.** Follow project plans to coordinate different activities and communicate any necessary changes. Complete projects on time and within budget.
- **Deeply Engaged in Community Organizing.** Develop strong working relationships and can communicate and connect effectively with a wide range of different people. Able to build a Board of residents to be an effective team to make decisions and move them through a process.
- **Culturally Sensitive and Aware.** Demonstrate respect and sensitivity for cultural differences, promote a harassment-free environment, upholds equity, diversity, and inclusion as a core value.

TERM OF CONTRACT

Primary Term. The primary term of the Contract awarded as result of this invitation (if any) shall commence on the date of final Contract execution and terminate on September 30, 2023 (the

Contract Term), unless terminated earlier pursuant to the terms of the Contract. The primary term plus any renewal terms or extensions, if any, shall constitute the Contract Term.

Renewal Terms. ROC USA shall have the right to renew the term of the Contract for up to one (1) additional month, and one (1) additional six (6) month period, through March 31, 2025, with consideration to Contractor performance.

Responsibility for Correction of Errors and Oversights. The Contractor shall be responsible for ensuring that there are no errors or oversights in all final documents, reports, statistical analyses, financial analyses, work papers, work products, materials, approaches, designs, specifications, systems, documentation, methodologies, concepts, research materials, intellectual property or other property developed, produced, or generated in connection with the Contract.

FINANCIAL TERMS AND CONDITIONS

Maximum Contract Amount. ROC USA's maximum liability to the Contractor, including consideration for the full, satisfactory, and timely performance of all its duties, responsibilities, and obligations, as set forth in the Contract or arising out of any performance, shall not exceed (amount to be determined at the time of Contract award) for the initial Performance Period beginning on the Effective Date. The Contractor will not be compensated for services performed before the effective date of the Contract. The Contractor shall have no entitlement to payment of the Maximum Contract Amount.

The Contractor shall monitor all fees to ensure that the amount of each new invoice added together with all previous invoices during the current Performance Period will not exceed the Maximum Contract Amount for the Performance Period. The Contract shall provide thirty (30) calendar days advance notice to ROC USA if the cost of services is anticipated to exceed the Maximum Contract Amount for the Performance Period. Any increase(s) in the Contract amount for the Performance Period shall require a written Contract amendment executed by the Parties, that specifies the new Maximum Contract Amount for the Performance Period. The total of any and all such increase(s) should not exceed 25% of the original amount determined for the Performance Period.

Purchase of Services. ROC USA, at the time of contract, cannot and does not guarantee the purchase of a certain level, quantity, or utilization of any services during the Contract Term. Some services may be purchased upon ROC USA's request, in "as-needed" quantities, on an "as-needed" basis, as determined by ROC USA and the program requirements. No authorization for the purchase of any services is provided until the Contractor receives such written notice from ROC USA in accordance with the terms of the Contract.

Contract Issuance. ROC USA shall issue an executed Contract, or amendment as applicable, as written notice for all Contract authorizations for the purchase of services specified in this request. No authorization for the purchase of any services is provided until such Contract or, if applicable, amendment, has been fully executed by the Contractor and ROC USA. Upon notice from ROC USA that a Contractor or amendment, if applicable, has been properly executed, the Contractor shall identify the proper personnel to receive direction from ROC USA, to manage the work being performed, and to act on behalf of the Contractor. The Contractor shall ensure that its personnel, or authorized designee, is available for consultation with ROC USA.

Delivery. All deliverables under the Contract shall be made in accordance with the Contract requirements listed in this request. No substitutions or cancellations shall be permitted without prior written approval from ROC USA. The Contractor shall keep ROC USA advised at all times of the delivery status of services to be provided. If the Contractor foresees problems, delays, or adverse conditions that may prevent the Contractor from meeting requirements, the Contractor shall give timely written notice to ROC USA that explains the reason(s) for the delay and proposes an alternate delivery for ROC USA's approval. ROC USA has the right to accept or reject the proposed alternative delivery in its sole discretion.

Invoicing and Payment. All invoices for services provided shall be submitted to ROC USA on a timely basis. Any invoice that does not comply with the minimum requirements stated in this section may not be considered valid and may be subject to rejection and/or return to the Contractor. Upon the request, the Contractor must submit to ROC USA any additional documentation or explanation that may be required to support or document the requested payment under the Contract.

Each invoice presented must include Contract name; the name and division of the ROC USA contract; report for the services provided under this Contract; and date, description of each service and the dollar amount attributed, and if applicable, the number of hours associated with each service.

The Contractor shall submit itemized invoices for all services completed, delivered to, and accepted by ROC USA, per the Contract requirements. Invoice amounts shall be made payable to the Contractor at the address on file and/or with the wire transfer instructions indicated in the Contract.

Invoices and payment inquiries shall be submitted to:

Nicholas Salerno
Chief Operating Officer
6 Loudon Road, Suite 501, Concord, NH 03301
nsalerno@rocusa.org

Restrictions on Reimbursement of Expenses. Because all costs of services and expenses are expected to be included within the Contractor's proposal, and ROC USA expects the number of physical project site inspections and/or required travel will be minimal, ROC USA will generally not reimburse Contractor for any expenses incurred in the performance of services. However, ROC USA may, in its sole discretion, authorize the reimbursement of certain unanticipated expenses in accordance with the following:

Pre-Approval Required. The contract may only be reimbursed for actual expenses that are pre-approved in writing by ROC USA. Contractor must provide ROC USA with a written justification to substantiate how any expenses proposed for pre-approval are reasonable and necessary for the performance of required services under the Contract and could not have been reasonably anticipated as part of the fees set forth in the proposal.

Submission of Invoices. The Contractor is warranting the following: invoices have been carefully reviewed to ensure that all invoiced services have been performed or delivered in compliance with all terms of the Contract, the charges shown on the invoice are allowable costs that are reasonable, necessary, and where applicable, do not exceed the amounts provided for in the Contract, the amount of each invoice added together do not exceed the Maximum Contract Amount as referenced in the Contract, and all supporting documentation is attached.

Contract Monitoring. The Contractor's performance will be monitored regularly as work is performed in accordance with the terms and conditions of the Contract. Monitoring activities may include, but are not limited to:

- Inspection of services, prior to acceptance, to ensure Contract compliance.
- Performance review and project planning meetings held to review timeline and project status.

Records Retention. The Contractor shall maintain adequate records to support its charges, procedures, and performances for all work relating to the Contract. Records shall be maintained by the Contractor and made available to ROC USA and authorized representatives during the Contract Term and thereafter until the later of the expiration of: seven (7) years from date of final payment by ROC USA for the services provided under the Contract; or seven (7) years from date of final completion of any audit, dispute, litigation, or the settlement of claims arising out of such performance, or costs or items to which an audit exception has been taken.

SPECIAL TERMS AND CONDITIONS

Contract funds are not eligible for use to provide an advance payment to the Contractor. The Contractor must adhere to the following administrative requirements; however, additional provisions may control.

Federal Law Compliance. The Contractor shall ensure activities under this Contract focus on the allowable activities and costs authorized under this federal funding opportunity, and other relevant statutes, rules, guidance, and regulations.

State Law Compliance. The Contractor shall ensure that activities funded under this Contract include only allowable activities and projects authorized by state law. .

RESPONSE PROCESS AND GENERAL INFORMATION

The Respondent is solely responsible for a thorough understanding of the services and any supporting documentation. By submitting a response in response to this opportunity, ROC USA has a right to assume that the Respondent fully understands the specifications and will abide by all terms and conditions of the Request for Qualifications.

Date and Deliverables

The solicitation process for this RFQ will proceed according to the schedule below. ROC USA reserves the right to revise any of the time periods listed below and will post all changes by published addendum on the ROCUSA.org career website.

Item(s)	Due Date
Request for Qualifications Solicitation	May 19, 2023
Deadline for Questions by Bidders Due	June 2, 2023
ROC USA's response to Questions Posted	May 26, 2023
Deadline for Submission of Responses	May 29, 2023
Interviews conducted, if requested	Week of May 29, 2023
Anticipated Start Date	June 12, 2023

Question Submission

Questions must be submitted electronically to Nicholas Salerno, Chief Operating Officer, nsalerno@rocusa.org no later than June 2, 2023. The subject line should read: Questions about resident coordination and facilitation services. To ensure you receive communications on updates to this request, please submit an email to nsalerno@rocusa.org with your intent to apply.

Bid Requirements

The Vendor must submit their bid electronically with their qualifications and hourly rates to nsalerno@rocusa.org no later than May 29, 2023. The subject line should read: Bid for Resident Coordination and Facilitation Services. Each Respondent may submit only one response. If a Respondent submits more than one response, all responses from that Respondent may be rejected.

Bids may respond to the requirements by providing qualifications and experience. If a Respondent merely agrees or disagrees with the requirements will not be considered responsive.

Rejection of Responses and Cancellation of Invitation. Issuance of this Request of Qualifications and/or receipt of responses does not constitute a commitment on the part of ROC USA to award a Contract. ROC USA maintains the right to accept or reject any or all responses and to cancel this invitation, re-issue a subsequent solicitation, and/or remedy technical errors in the process if ROC USA, in its sole discretion, considers it to be in the best interests of ROC USA to do so. The decision of ROC USA in this regard shall be conclusive.

Cost Incurred. Respondents understand that issuance of this no way constitutes a commitment by ROC USA to award a Contract or to pay any costs incurred by a Respondent in the preparation of a response. The Respondent is responsible for any expense related to the preparation and submission of its response.

No Obligation of ROC USA for Discussion of Responses with Respondents. ROC USA reserves the right to select one or more qualified Respondent(s) to this RFQ without providing any Respondent with an opportunity to present or discuss its response.

BID SUBMISSION

The purpose of the response is to demonstrate the qualifications, competence, and capacity of the Respondent and proposed staff to undertake the engagement described. The response should contain sufficient information to assure ROC USA of its completeness.

ROC USA seeks a Contractor with deep cultural competence, experience working with nonprofits, and community residents, specifically a Respondent who has:

- Experience working collaboratively to co-create and meet diverse goals of multiple stakeholders, specifically residents and/or community leaders.
- Experience in real estate is a plus, but not a requirement.
- Experience in community organizing, and experience with

1. Cover Letter

A cover letter must include a point of contact name, address, telephone and email address and the Vendor's website URL. The cover letter should briefly describe:

- a) Briefly introduce your experience
- b) Relevant qualifications
- c) Justification on why you and/or your firm is a good match for this Project.
- d) Any exceptions you and/or your firm takes to this scope of work, required deliverables, or terms and conditions.

The cover letter should not exceed one page in length.

2. Background and Experience

This section should identify the Project lead and team members (if applicable) along with their relevant background and qualifications. Attach resumes for all proposed personnel. Relevant background and qualifications should respond to the services requested that includes facilitation of community meetings, relationship building with residents and homeowners, translation, and interpretation from English to Spanish.

You may attach work products to illustrate relevant experience.

3. Description of Resources

Each Respondent shall provide a detailed, written description of administrative, operational, and management structure of its organization, including resources the Respondent possess and that it will provide to perform the services (e.g., staff, facilities, business equipment, systems, accounting systems, internal auditing procedures, management and administration, legal services).

Additionally, provide an organizational chart showing the staffing and lines of authority for the specific personnel to be used on this opportunity. The relationship of the Contractor point of contact to management and to support personnel should be clearly illustrated. The Contractor is expected to assign staff at appropriate levels to services as required by this RFQ.

Staff Qualifications and Experience. Each Respondent must provide a detailed profile with its response describing how it is qualified to accomplish the Services identified. Through this profile, the Respondents must demonstrate extensive experience in, and understanding of, the nature of the work required. The Respondents must demonstrate appropriate credentials and experience regarding the services under this invitation. The profile must include any responsibilities for ROC USA.

5. Past Performance (References)

Provide contact information for three professional references who can speak to your performance on completing the project and/or proposed deliverables of similar scope, size, and complexity. Include a brief description of the projects associated with the references.

Price Proposal

Outline proposed labor categories and hourly rates when deriving an overall estimated price of completing the work for that deliverable. If you are requesting additional direct costs, itemize and provide a justification for them.

The costs response shall also include costs of any proposed “ad hoc services” that are in addition to the services specifically outlined but which fall within the scope of the services and are recommended by the Contractor. Such services may be purchased at ROC USA’s option, on an as-needed basis, in as-needed quantities, as determined by ROC USA in response to specific events or opportunities.

No specific amount of compensation is guaranteed to a Respondent under any contract resulting from this invitation.

Assumptions and Exceptions. Each Respondent shall clearly state any assumptions it made in its response. Each Respondent shall also clearly identify any exceptions it takes to specific provisions of the RFQ, including any proposed terms and conditions as set forth in RFQ, noting the specific RFQ part. Each Respondent shall provide specific and detailed reasons for each exception, together with suggested alternative language. If there are no exceptions, the Respondent shall explicitly state that the Respondent takes no exception to any part of the RFQ.

Evaluation Criteria

ROC USA intends to conduct a fair, comprehensive, and impartial evaluation of all responses received in response to this request using an evaluation committee. Each member of the evaluation committee will independently evaluate each response to this invitation. Evaluation committee members may seek, obtain, and consider the opinions of other committee members or subject matter experts.

The successful Vendor will present evidence of experience and a proven record of accomplishment in providing the required services. ROC USA may not select a provider of services or a group or association of providers or award a contract for professional services on the basis of competitive bids submitted for the contract or the services, but will make the selection and award: 1) on the basis of demonstrated experience and qualifications to perform the services; and 2) for a fair and reasonable price.

Each Respondent must demonstrate in its response that it has the necessary ability, technology, and financial resources to provide the services. Higher scores will be given to the Respondents that are experienced, fully trained, and ready to receive and begin assignments as of the expected effective date of any contract resulting from this invitation. In addition to personnel, readiness includes having established internal procedures/applications for reporting, tracking, or other processes related to the project. Documentation of readiness level must be outlined in the response.

ROC USA will assess potential Vendors according to the following criteria:

1. Background and Experience

Respondents should:

- Have at least five (5) years of combined experience in the field of community development with proven experience in community organizing.
- Provide high-quality and relevant references that demonstrate the ability to carry out the proposed services.
- Provide descriptions of their ability to manage projects with quick timelines that requires community engagement and decision-making.

2. Past Performance

- Respondent's references check should indicate no major past performance issues, concerns, or risks associated with the Vendor's performance.
- If applicable, the Respondent has delivered quality, timely, and cost-effective products through previous engagements with ROC USA.
- Respondents will perform the services outlined in the scope of work for a competitive price.

ROC USA will make an award to the Respondent(s) whose proposal(s) represents the best value for ROC USA, considering both cost and non-cost factors. ROC USA may upon its discretion establish a competitive range of qualified proposals for award consideration. ROC USA will not conduct discussions and/or negotiations with Vendors not in the competitive range and those Respondent(s) will not be considered for an award.

Selection of the successful respondent would be based on an evaluation of all information provided in the response and at the sole discretion of ROC USA. All Respondents will be notified in writing of the outcome of the selection process.

ROC USA reserves the right to reject any and all proposals. If all proposals are rejected, ROC USA may undertake the services by such means as it deems suitable. ROC USA further reserves the right to waive any requirements on a case by case basis in connection with the preparation and submittal of proposals.