



## **Request for Proposal**

### **Development of New NAHMA Master of Occupancy Course and Materials**

#### **RFP Overview**

The National Affordable Housing Management Association (NAHMA) plans to develop and launch a new NAHMA Master of Occupancy course. To do so requires outsourcing the drafting of the course content and materials to an expert in federal affordable housing occupancy policy and regulations who will develop a course for mid-level to senior property management staff. It is envisioned that the new one-day course will cover advanced topics related to working with HUD 4350.3 REV 1-Change 4, managing mixed-finance properties, enhancing “soft skills” needed for a senior occupancy specialist, managing front-line staff in their occupancy compliance duties, among others. Course materials to be developed by the chosen contractor for this project will include:

- \* Master of Occupancy course manual for students
- \* Master of Occupancy training manual for trainers
- \* One-day agenda / outline for administering the course
- \* Powerpoint for use by trainers in teaching the course
- \* Final exam in multiple-choice format for students to take at the end of the course to demonstrate mastery of the course content

The purpose of this Request for Proposal (RFP) is to solicit proposals from federal affordable housing occupancy policy experts who would like to work with NAHMA on the development of its new Master of Occupancy course.

#### **About NAHMA**

NAHMA is the leading voice for affordable housing management, advocating on behalf of multifamily property managers and owners whose mission is to provide quality affordable housing. NAHMA supports legislative and regulatory policy that promotes the development and preservation of decent and safe affordable housing, is a vital resource for technical education and information, fosters strategic relations between government and industry and recognizes those who exemplify the best in affordable housing. Founded in 1990, NAHMA’s membership today includes the industry’s most distinguished multifamily owners and management companies. NAHMA is the voice in Washington for 19 regional, state and local affordable housing management associations (AHMAs) nationwide.

For more information, please visit [www.nahma.org](http://www.nahma.org).

## **Scope of Work**

The purpose of this RFP is to solicit proposals from federal affordable housing occupancy policy experts who would like to work with NAHMA on the development of its new Master of Occupancy course. The selected contractor must be able to meet deadlines set by NAHMA for the development of this course that includes in part:

- Dialogue with NAHMA's Master of Occupancy Course task force on the course focus, content and materials.
- Dialogue with NAHMA's Certified Professional of Occupancy trainers to solicit their recommendations for content of the training manual, Powerpoint and the examination.
- Ensure that the course accurately reflects current occupancy regulations.
- Submit a first draft to NAHMA of the new Master of Occupancy course manual for students within 60 days of executing a contract with NAHMA. The first draft of the course manual for students will be reviewed by NAHMA representatives and certified trainers, who will provide feedback to the contractor within 30 days of their receipt of the draft.
- Based on the feedback provided by NAHMA representatives and trainers, the contractor will make any necessary changes to the course manual for students, and will also then complete the other required deliverables under this RFP (Master of Occupancy training manual for trainers, one-day agenda / outline for administering the course, Powerpoint for use by trainers in teaching the course, final exam in multiple-choice format for students). All final deliverables under this RFP are due to NAHMA within 45 days of the date the contractor receives feedback from NAHMA representatives and trainers on the draft manual for students.
- The contractor will attend the course pilot, and provide NAHMA with revised final course materials based on revisions that may be needed as become apparent with the holding of the course pilot within 40 days of the pilot, based on receiving timely feedback from NAHMA representatives within 10 days of the pilot.

## **NAHMA Support**

NAHMA will administratively support the contractor as follows:

- Provide a current hard copy and electronic copy of the NAHMA Certified Professional of Occupancy training course manual, course curriculum, and final exam (to see what is already covered by this NAHMA course).
- For printing purposes, format the Master of Occupancy course manual, training manual and final exam, after final products are received from the contractor.
- Assume liaison role in coordinating course development process between contractor and NAHMA representatives and NAHMA FHC certified trainers.

## **RFP Procedures**

RFP responses should address the following criteria, which will be carefully assessed during the review process:

- Contractor's credentials in the area of federal affordable housing occupancy policy (see Contactor's Qualifications, pg. 4)

- Contractor’s experience with curriculum development, particularly in the area of federal affordable housing occupancy policy
- Ability to meet specific deadlines outlined in the RFP and the contract executed between NAHMA and the contractor
- A proposed “not to exceed” cost for providing all required deliverables in the timeframe outlined in this RFP, as well as an itemized breakdown of proposed costs
- References applicable to expertise in federal affordable housing occupancy policy

**RFP and Project Timeline**

<b>Date</b>	<b>Activity</b>
Oct. 1, 2013	RFP published and announced
Nov. 1, 2013	RFP responses due
Nov. 4, 2013	NAHMA internal review of responses for completeness
Nov. 15, 2013	Staff and NAHMA representatives* ranking of submitted proposals
Nov. 18, 2013	Review/follow up with contractors on proposals (if necessary)
Dec. 3, 2013	Final selection of contractor
Dec. 17, 2013	Execution of contract with NAHMA
Feb. 17, 2014	First draft of student course manual due from contractor
Mar. 17, 2014	NAHMA comments due to contractor on draft student course manual
May 2, 2014	All final course material deliverables due from contractor
June 2014	Pilot course held; contractor attends
40 days from pilot course	Any revised final course materials due from contractor

\*A work group comprised of members from NAHMA’s Education and Training Committee and CPO trainers will serve as NAHMA’s representatives in reviewing the submitted proposals. Members of this NAHMA work group shall not be respondents to the RFP, nor shall they have a business or other relationship with respondents such that it might be perceived as constituting a conflict of interest in selecting the contractor for this project.

Please e-mail responses to (or questions regarding) this RFP to [brenda.moser@nahma.org](mailto:brenda.moser@nahma.org), and please also mail a hard copy of responses to:

Brenda Moser  
National Affordable Housing Management Association  
400 N. Columbus St., Suite 203  
Alexandria, VA 22314

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**Contractor's Qualifications**

Please provide answers to the following questions in as efficient a manner as possible.

**GENERAL COMPANY INFORMATION**

- 1) Provide a brief history of your company, including the number of years your firm has been in business and the number of years of experience in the affordable housing industry and updating course material.
- 2) Describe your company's mission.
- 3) Provide a brief summary of your company's operations.
- 4) How many employees work for your company and how many would be dedicated to this project?
- 5) Provide a partial list of your company's customers and the type of services that you provide them.

**EXPERIENCE**

- 6) Describe your company's experience with similar programs/projects.
- 7) Describe your company's experience, if applicable, in updating course materials, curriculums, and examinations for associations (or others).
- 8) Do you currently service any other affordable housing associations or customers of affordable housing associations?
- 9) Do you offer any feature(s) that might be unique to the affordable housing association community?
- 10) What distinguishes your company and your products from your competition?

## **PROJECT - SPECIFIC INFORMATION**

- 11) Provide a detailed description of the work plan for development of NAHMA's new Master of Occupancy Course and Materials, including sources to be researched, etc.
- 12) Describe your process for responding to information requests and updates from NAHMA.
- 13) Please provide your proposed total fee for developing the course and materials for the new NAHMA Master of Occupancy course as outlined under Scope of Work on page 2. Please present as a total proposed "not to exceed" cost for providing all required deliverables in the timeframe outlined in this RFP, as well as an itemized breakdown of fees.

## **REFERENCES**

- 14) Please list the organization name, contact person and telephone number of three (3) references for similar projects, as well as a brief description of each project.

## **OTHER**

- 15) Provide any other information that you believe is pertinent to this Request for Proposal.