



North Los Angeles County Regional Center

Main 818-778-1900 • Fax 818-756-6140 | 9200 Oakdale Avenue #100, Chatsworth, CA 91311 | www.nlacrc.org

ATTACHMENT B

PROPOSAL REQUIREMENTS

1. Proposal Title Page (Attachment A)

- a. Complete the NLACRC Title Page ([Attachment A](#)) and provide the name, address, and contact information of the applicant.
- b. If the applicant is a corporation, list the principal members of the corporation and include verification of incorporation in California.

2. Table of Contents

3. Experience & Qualifications

Describe the development and management experience of the HDO, and any person, agency, business, and/or organization retained by the HDO and other development team members (e.g. developer, architect, accountant, consultants, etc.). Include resumes, a description of the financial ability to complete the project, a summary of past projects similar to the ones in this RFP, and a narrative of proposed property ownership from acquisition to conversion to permanent financing.

4. Housing Proposal Overview

Provide a description of the design features (e.g., floor plan, number of bedrooms, egress, security, fire protection, etc.) of the proposed property that supports the needs of the individuals for whom the home is being developed.

Describe the ideal neighborhood of the proposed property and the impact of the project on the surrounding community. Describe what the specific search criteria will be for the project. Location selection criteria must include consideration of local resources, including transportation, access to generic services and the availability of supportive services, and programs that are available for clients residing in the proposed development.

The applicant must indicate and confirm the requirement that all acquired properties must be equipped with fire sprinklers. Indicate your knowledge and understanding of the types of fire sprinklers required based on regulation, statute and any interpretations provided by the California State Fire Marshal. Please note that the project is expected to have delayed egress fencing.



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Describe the property management services provided by the applicant once the project is completed and the house is turned over to the service provider for ongoing services. Discuss the process for accessing repair services and the response time of property management staff upon receiving a request for service. Indicate what resources will be dedicated to the home in the event of “life threatening structural conditions” ([Title 17, Section 56053 \(a\)\(1\)](#)).

5. Financial Section

- Describe how the HDO will maintain accounting, financial and other records related to the use of CRDP funding.
- The applicant must acknowledge the requirement that a minimum down payment of 20% is required for housing acquisition.
- Provide a detailed Estimated Sources and Uses of Funds for the project. Indicate that the Sources and Uses for Funds will need to be updated, as needed, at the following times:
 - Upon the acquisition of the property (during the escrow period);
 - Upon approval of the renovation bid/budget;
 - Upon submission of a request to modify the approved Housing Approval;
 - At reconciliation of CRDP funds upon completion of each project; and
 - At any time requested by DDS.
- Outline the terms of the loan(s) and/or debt service. If long-term funding is a mortgage loan, include proposed loan terms and the going mortgage rate the applicant can secure. Acknowledge that mortgage loans shall not exceed a 15-year term unless approved by DDS.
- Provide a 15-year pro forma operations budget that demonstrates the project's financial feasibility along with anticipated lease payment as follows:
 - Anticipates income from all sources to be used to fund and operate the project to completion.
 - Accounts for required replacement or maintenance reserve funds.
 - Estimates total amount of debt service (i.e., mortgage payment), property taxes, property insurance, and property management expenses (if applicable).
 - Details the process and management of application for property tax exemption and payment of property taxes as required by the city, county or local municipality.
 - Demonstrates ongoing pro forma of costs and lease terms that support financial sustainability.

6. Proposed Schedule of Development

- Describe the capacity of the HDO to expedite the development. Indicate what strategies will be used to identify properties.



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- Provide a detailed timeline/schedule of development (implementation plan), including identifying project milestones. The timeline/schedule of development should cover each major step of the project and include but not be limited to:
 - Upon selection by the regional center the timeframe for providing a corporation resolution that authorizes the signatory to sign on behalf of and obligate the HDO.
 - Provision of funding commitment letters
 - Provision of evidence of property site control
 - Loan closing and property acquisition
 - Provision of evidence of property purchase, including an executed, recorded deed of trust and regulatory agreement
 - Provision of evidence of application to the County Tax Assessor
 - Provision of final sources and uses (budget)
 - Certificate of Occupancy (Notice of completion, if renovation)
 - Executed, long-term lease agreement between HDO and service provider
 - Executed, property management agreement
 - Evidence of property insurance
 - Property tax exemption, if not provided sooner
 - Reconciled sources and uses of funds (budget)
- Describe the process the HDO will implement to ensure compliance with all state and local building requirements, including without limitation the regional center's receipt of verification that each project has received all applicable, required permits prior to the start of any demolition, construction, or renovation/rehabilitation.
- Acknowledge that prior to securing a property, the applicant will be required to ensure that there is no other Community Care Licensed home within 300 feet of the property

7. Documentation Requirements

- a. Organization Chart
- b. Resumes and Job Descriptions for individuals identified for the implementation and oversight of this project
- c. Three (3) references or letters of reference relevant to experience or other qualifications required to complete this or similar projects. Please be aware that NLACRC will contact references to verify qualifications and experience.
- d. List of all projects with other regional centers and current status of each project. List should identify the project name, address, acquisition date and renovation completion date (certificate of occupancy date), original budgets for acquisition, renovation, and additional funds secured to complete the project (if any).
- e. Income Tax, Profit and Loss statements, balance sheets, and independent audit report for the last three (3) years



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HDO Documents

Provide the following HDO documents, including, but not limited to:

Applicant must submit separate attachments of each of the documents identified below.

Non-Profit Corporations

- a. Internal Revenue Service approval of 501 (c)(3) status
- b. Articles of Incorporation demonstrating that the organization's mission includes the development and management of housing for regional center clients
- c. Bylaws of the corporation
- d. A list of current officers and Board of Directors
- e. Certificate of Status of Good Standing with the California Secretary of State (current, within 240 days of proposal submission)
- f. A corporate resolution authorizing the execution of documents by the designated signatory of the HDO.
- g. An executed Conflict of Interest Statement ([Attachment C](#)).
- h. Provide three (3) years of audited financial statements with the most recent audit an unqualified audit opinion completed by a Certified Public Accountant using accepted accounting practices. (If the HDO has responded to another RFP for Housing Acquisition and Rehabilitation, for NLACRC within the last 12 months and has submitted the required audited financial statements, resubmission of these documents may not be required.)
- i. Provide current, year-to-date financial statements of the HDO.

Limited Partnerships

- a. A certificate of Limited Partnership (LP-1)
- b. Amendment to Certificate of Limited Partnership (LP-2), if any.
- c. Current Limited Partnership Agreement, as amended, which defines that the purpose is to develop and manage Affordable homes for individuals with special needs, including those with developmental disabilities, and identifies the leadership and responsibilities of the LP.
- d. Limited Partnership's approval to acquire housing.

Limited Liability Companies (LLC's)

- a. Limited Liability Company Articles of Incorporation (LLC-1)
- b. Limited Liability Company Certificate of Amendment (LLC-2), if any.
- c. A fully executed operating agreement and all amendments which define that the purpose is to develop and manage affordable homes for individuals with special needs, including those with developmental disabilities, and identifies the corporate leadership and responsibilities of the LLC.
- d. Limited Liability Companies approval to acquire housing



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For-Profit Corporations

If selected, for-profit corporations will be provided with a list of required HDO documents.

CPP Property Documents

Acknowledge an understanding and commitment to adhere to all the different documentation requirements and timelines that are part of the CPP Housing Guidelines, including:

1. Restrictive Covenant
2. DDS CPP Deed of Trust
3. Profit Participation Agreement or DDS Community Placement Plan Promissory Note Secured by Deed of Trust
4. Lender Notices
5. Order of Recordation
6. Title Insurance
7. Escrow Instructions