

STATE OF OREGON



COVER PAGE

OREGON HOUSING AND COMMUNITY SERVICES DEPARTMENT

HOMEOWNER ASSISTANCE FUND

OUTREACH AND APPLICATION INTAKE ASSISTANCE

Request for Applications ("RFA")

RFA #7091

Date of Issue: October 29, 2021

Closing Date and Time By: March 31, 2022 at 5:00 p.m. PDT

Applications will be reviewed upon submittal, which may be prior to the Closing Date and Time. The final date for Applications to be accepted for review is by the Closing Date and Time above.

Single Point of Contact ("SPC"): Jessica Nelson, Procurement & Contracts Policy Analyst

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LIST OF ATTACHMENTS

ATTACHMENT A – APPLICANT INFO SHEET

ATTACHMENT B – SAMPLE GRANT AGREEMENT

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ATTACHMENT C – DISCLOSURE EXEMPTION AFFIDAVIT

ATTACHMENT D - HAF MORTGAGE REINSTATEMENT PROGRAM

ATTACHMENT E – HAF FORWARD PAYMENT ASSISTANCE PROGRAM

ATTACHMENT F – RFA CHECKLIST

ATTACHMENT 1 – CULTURALLY SPECIFIC ORGANIZATION

Attachments will be posted separately on the Agency’s website.

SECTION 1: GENERAL INFORMATION

1.1 INTRODUCTION & PROJECT OVERVIEW

The State of Oregon, acting by and through the Oregon Housing and Community Services, (“Agency”), is issuing this Request for Application (“RFA”) to request Eligible Organizations to conduct direct outreach and/or provide application intake assistance for the Homeowner Assistance Fund (“HAF”). Successful applicants will be able to utilize their established community ties to provide homeowners with the grant services.

Agency has reserved approximately \$300,000 as the cumulative amount of funding available to all selected Eligible Organizations. There is a maximum of \$60,000 available per Eligible Organization, depending on the applicable track(s), as defined in Sections 1.5 and 1.6, to be spent within the Grant Agreement term or to reimburse incurred approved expenses dated no further back than November 1, 2021.

An Applicant must select the appropriate track(s) it desires to apply for funding under the HAF programs. An Applicant may select both tracks, see Attachment A (Applicant Info Sheet).

Direct Outreach Activities

“**Track One**” provides flexibility for Applicants to create informational programming for outreach in their local communities using the most appropriate method and format for their community. This could include video content; telephone/dialing campaigns; email messaging campaigns; print materials; radio/TV/print advertisements; and social or digital media content. Agency would like to compile copies of the outreach materials so they may be accessible to other communities of homeowners throughout Oregon. Agency also requests quarterly reporting on outreach activities conducted during each quarter.

Application Intake Assistance

“**Track Two**” includes application intake, homeowner support with quarterly income re-certification, and in-person, mobile, or remote online notarization services. This track is intended to provide homeowners with optional in-person assistance where online application submission and/or loan document signing is difficult or inaccessible.

Anticipated Award: Agency anticipates awarding multiple Grant Awards (“Awards”) from this RFA to achieve statewide coverage, through Eligible Organizations, of homeowners that may not otherwise hear about the HAF programs, that may be traditionally Underserved Populations, and may need assistance submitting applications.

Agency anticipates awarding multiple Grant Awards (“Awards”) from this RFA to Eligible Organizations to achieve statewide coverage of homeowners that may not otherwise hear about HAF programs, may be

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traditionally Underserved Populations, and may need assistance submitting applications.

Agreement Term: Successful Applicants will be invited to enter into an agreement with the Agency to set forth the terms and conditions that govern the Award (“Agreement”). The initial term of the Agreement is anticipated to be two (2) years from Agreement execution with options to renew up to a cumulative maximum of five (5) years, or as deemed necessary by Agency.

1.2 SCHEDULE

Event	Date	Time
Questions / Requests for Clarification Due	4 weeks prior to the Closing Date	
Answers to Questions / Requests for Clarification Issued (approx.)	Ongoing and no later than 1 week prior to the Closing Date	
RFA Protest Period Ends	Schedule defined under OAR 813-005-0025	
Closing (Application Due)	See RFA Cover Page	

The table above represents a tentative schedule of events. All times are listed in Pacific Standard Time. All dates listed are subject to change.

1.3 SINGLE POINT OF CONTACT (SPC)

The SPC for this RFA is identified on the Cover Page, along with the SPC’s contact information. Applicant shall direct all communications related to any provision of the RFA only to the SPC, whether about the technical requirements of the RFA, contractual requirements, the RFA process, or any other provision.

1.4 PURPOSE OF THIS REQUEST

The economic implications of the COVID-19 pandemic have reached far and wide, causing a negative impact to homeowners throughout the state of Oregon. Homeowners that have been protected by forbearance plans or the state foreclosure moratorium may need assistance and guidance to navigate becoming current on their mortgages and other housing costs. HAF may be one of the options available to assist low to moderate-income homeowners who have experienced a negative financial impact associated with the pandemic.

Agency will administer two HAF programs for Oregon homeowners: 1) a Mortgage Reinstatement Program to cure mortgage delinquencies and bring certain housing costs current and 2) a Forward Payment Assistance Program to help homeowners who are experiencing an ongoing financial hardship or need additional recovery assistance. Proposed terms for these programs are attached for reference as Exhibits D and E; they are subject to change based upon future US Treasury review. Agency anticipates opening these programs in phases beginning in November 2021, limiting the initial phases to homeowners most at risk of foreclosure or displacement. Agency plans to open its programs to all eligible homeowners in early 2022 and will provide Grantees with initial and ongoing updates related to the phased opening.

Agency expects that **Track One** Applicants will use their established community ties to provide outreach on the HAF programs and phased opening to homeowners in their communities. These outreach activities should increase the presence and impact of community assistance resources (i.e. digital media, brochures, pamphlets, radio advertisements etc.) to engage homeowners and educate them on the HAF programs and HAF’s purpose within the context of a typical homeowner situation (forbearance, reinstatement, other loss mitigation options). Agency will support Grantees in crafting this messaging.

Agency is particularly focused on reaching homeowners most at risk of foreclosure, those in rural

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communities, Underserved Populations, and Socially Disadvantaged Individuals. Preference will be provided to Rural Organizations and Culturally Specific Organizations who can assist the agency in connecting with homeowners in need. Increasing information and outreach in multiple languages, formats, and media will help homeowners all over the state better understand their options and avoid foreclosure.

Track Two Applicants will support individual homeowners seeking assistance through the HAF programs. These Applicants will help homeowners submit applications online, provide supporting documentation, sign applications and/or program loan documents, and submit any required quarterly hardship certifications. In addition to targeting the homeowners mentioned in the preceding paragraph, Agency hopes Applicants will assist homeowners that encounter barriers preparing documentation or submitting an online application or face limitations related to, without limitation, language, disability, internet access.

Particularly in the first phases of opening, many homeowners that might apply for HAF assistance would also benefit from housing counseling and/or legal aid services. Agency plans to provide information on Homeownership Centers and legal aid on its HAF application to encourage homeowners to use these resources. Agency hopes all Applicants will inform homeowners about counseling and legal aid opportunities.

SECTION 2: AUTHORITY AND GRANT ACTIVITIES

2.1 AUTHORITY

Agency is issuing this RFA pursuant to its authority under OAR 125-246-0170(2), ORS chapters 456 and 458, OAR chapter 813, divisions 5 and 6, as well as other applicable rules.

Agency is using the Competitive Procurement Procedures, pursuant to OAR 813 Divisions 5 and 6. Agency may use a combination of the methods for Competitive Procurement Procedures, including optional procedures: a) Competitive Range; b) Interviews; c) Additional Submittal Items; and d) Negotiations.

2.2 DEFINITION OF TERMS

For the purposes of this RFA, capitalized words are defined in OAR 813-005-0005 (“General Definitions”) and within the HAF program guides (Attachments D and E) unless provided within this document.

“Community of Color” means identity-based communities that hold a primary racial identity that describes the racial characteristics of the community that its members share (such as being African American) that supports self-definition by community members, and that typically denotes a shared history and current/historic experiences of racism. The community may or may not also be a geographic community. Given that race is a socially-defined construct, the definitions of these communities are dynamic and evolve across time. For the purpose of this RFA, Agency defines communities of color to include Native Americans, Latinos, Asian and Pacific islanders (further disaggregated according to local preferences), African Americans, African Immigrants and Refugees, Middle Eastern, and Slavic communities.

“Cultural Diversity” means the existence of a variety of cultural or ethnic groups within a society.

“Culturally Specific Organization” means an entity that provides services to a cultural community and the entity has the following characteristics:

- (a) Majority of members and/or clients are from a particular community of color;

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- (b) Organizational environment is culturally focused and the community being served recognizes it as a culturally-specific entity that provides culturally and linguistically responsive services;
- (c) Majority of staff are from the community being served, and the majority of the leadership (defined to collectively include board members and management positions) are from the community being served;
- (d) The entity has a track record of successful community engagement and involvement with the community being served; and
- (e) The community being served recognizes the entity as advancing the best interests of the community and engaging in policy advocacy on behalf of the community being served.

“Eligible Organization” means a nonprofit organization established under ORS Chapter 65, a local government, sovereign tribe, or a housing authority established under ORS 456.055 to 456.235, as applicable, which serves households at low or below 150% AMI for household size for the Eligible Organization’s County. If otherwise qualifying, Eligible Organizations may include faith-based organizations but those organizations may not seek or use funding for inherently religious activities, as may be determined by the Agency at its sole discretion.

“Culturally Responsive Services” means work tailored to an individual or communities’ cultural background, beliefs, knowledge, frames of reference, or specific needs in an Underserved Population. This may include:

- Business practices or strategies in place to understand and address the needs of a particular culture;
- A relevant marketing and outreach plan designed to publicize to Underserved Populations the availability of the new housing opportunities;
- Specific services offered in an individuals preferred language;
- Development, sponsorship or management by a diverse and representative leadership; or
- An ongoing service partnership with a culturally specific organization.

“Oregon Foreclosure Avoidance Program” means the state program authorized under ORS chapter 86 as administered by the Oregon Department of Justice and its third-party program administrator. Additional information is available at: <https://www.doj.state.or.us/consumer-protection/homes-mortgages/foreclosure-avoidance-program/>

“Forward Payment Assistance Program” means the HAF mortgage and housing cost assistance program described in this RFA. The current draft terms for this program are attached to this RFA as Attachment E.

“Homeownership Centers” means organizations that partner with Agency to provide housing counseling and other homeowner services in Oregon. Additional information and a list of all Agency-partnering Homeownership Centers is available at <https://www.oregon.gov/ohcs/homeownership/pages/housing-counseling.aspx>.

“Language Access Plan (“LAP”)” means a plan to address identified needs of the Limited English Proficiency (“LEP”) populations that include, but are not limited to:

- Identification of LEP persons who need language assistance and the specific language assistance that is needed;

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- Identification of ways in which language assistance will be provided;
- Identification of outreach strategies needed for LEP communities;
- Strategies to training staff on meeting the needs of LEP persons;
- Translation of informational materials in identified language(s) that detail services and activities provided to beneficiaries (e.g., model leases, tenants' rights and responsibilities brochures, fair housing materials);
- Providing interpreters for large, medium, small, and one-on-one meetings;
- Developing community resources, partnerships, and other relationships to help with the provision of language services; and
- Making provisions for monitoring and updating the LAP, including seeking input from beneficiaries and the community on how it is working and on what other actions should be taken.

“Mortgage Loan Reinstatement Program” means the HAF mortgage and housing cost assistance program described in this RFA. The current draft terms for this program are attached to this RFA as Attachment D.

“Rural Organization” means an organization with its main office(s) or multicounty service areas primarily based in an Oregon Communities outside the Portland Metro Urban Growth Boundary with a population of 15,000 or less in counties within Metropolitan Statistical Areas (Benton, Clackamas, Columbia, Deschutes, Jackson, Lane, Linn, Marion, Multnomah, Polk, Washington and Yamhill Counties) and in Communities with a population of 40,000 or less in the balance of the state.

“Socially Disadvantaged Individuals” means those whose ability to purchase or own a home has been impaired due to diminished access to credit on reasonable terms as compared to others in comparable economic circumstances, based on disparities in homeownership rates in the HAF participant’s jurisdiction as documented by the U.S. Census. The impairment must stem from circumstances beyond their control. Indicators of impairment under this definition may include being a (1) member of a group that has been subjected to racial or ethnic prejudice or cultural bias within American society, (2) resident of a majority-minority Census tract; (3) individual 3 with limited English proficiency; (4) resident of a U.S. territory, Indian reservation, or Hawaiian Home Land, or (5) individual who lives in a persistent-poverty county, meaning any county that has had 20% or more of its population living in poverty over the past 30 years as measured by the three most recent decennial censuses. In addition, an individual may be determined to be a socially disadvantaged individual in accordance with a process developed by a HAF participant for determining whether a homeowner is a socially disadvantaged individual in accordance with applicable law, which may reasonably rely on self-attestations.

“Underserved Populations” means a population whether identified by ethnicity, race, minority factors, culture, or place of origin with a shortage of or obstacle to services.

2.3 GRANT ACTIVITIES FOR TRACK ONE (DIRECT OUTREACH ACTIVITIES)

2.3.1 Outreach Requirements and Services

Services required for HAF outreach include but are not limited to:

- Provide translation services and have a LAP for persons with limited proficiency in speaking or writing English.
- Applicants that are not Agency partnering Homeownership Centers, must develop collaborative relationships with Agency and local Homeownership Centers to ensure that additional assistance opportunities are referred to inquiring homeowners (list of Homeownership Centers available here: <https://www.oregon.gov/ohcs/homeownership/pages/housing-counseling.aspx>).

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- Create and distribute HAF resources, subject to Agency approval, including, but are not limited to the following:
 - Radio/TV/Print Advertisement
 - Video Content Accessible to the Public
 - Telephone Campaigns
 - Email Campaigns
 - Print Materials such as Pamphlets/Brochures
 - Social or Digital Media Content
 - In person seminars or outreach clinics to sign up eligible borrowers in the appropriate phase
- Applicant must describe its current or planned administrative capacity to perform proposed outreach activities.
- Provide Agency with copies of outreach materials and resources prior to publication and distribution for Agency review and approval.

2.3.2 Outreach Anticipated Reporting Requirements

Grant reporting required for HAF outreach includes but is not limited to:

- Track and provide quarterly reports to Agency regarding outreach footprint and outcomes. Sample Tracking Reports are attached in Attachment B (Sample Grant Agreement).
- Quarterly, annual, and ad hoc data and reports to support Agency's state, federal, and U.S. Treasury reporting and auditing requirements, which Agency will further define or request during the grant term upon Agency receiving guidance on these topics.
- Homeowner demographic information; Agency will supply requested data points to Grantees.
- In person or virtual audits of processes and records at the Agency's election.
- Projection figures pertaining to community outreach to be achieved through informational programming and monitoring the actual outcomes.
- A final concise, narrative statement reflecting on the actual outcomes and identifying challenges and successes of the outreach activities, to be submitted to Agency within (30) days following the final distribution of funds under the scope of Award.

2.3.3 Outreach Support from Agency

Support to be provided by the Agency for HAF outreach includes but is not limited to:

- Agency shall cooperate with Grantee on proposed outreach activities to ensure accuracy and consistency through Agency review, consultation, and approval of materials and outreach.
- An online application web form, secure email, and/or secure file exchange system, if required for activities.
- Program documentation, factsheets, and eligibility requirements.
- Agency and Grantee shall mutually agree upon schedule of Services.

2.4 GRANT ACTIVITIES FOR TRACK TWO (APPLICATION INTAKE ASSISTANCE)

2.4.1 Intake Assistance Requirements and Services

Services required for HAF application intake assistance include but are not limited to:

- Provide translation services and have a LAP for persons with limited proficiency in speaking or writing English.
- At the time of Application, the Applicant must maintain, or establish, a physical office within Oregon, as

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the Agency encourages walk in clients to the extent possible in a safe manner and pursuant to all applicable health authority guidance.

- Applicant must describe their current or planned administrative capacity to perform application intake, including all necessary follow up activities and quarterly income certification.
- Applicant must have the technological capacity to deliver application intake assistance objectives by November 1, 2021 (or within 30 calendar days of Award), including but not limited to:
 - the ability to securely scan documents and return the originals to the document owners.
 - reliable internet access.
 - internet-enabled computers for Grantee and/or homeowner use.
 - Ability to conduct meetings via Zoom, MS Teams, or other virtual platforms.
 - Ability to exchange information and documents via secure email or file exchange system, which will be provided by Agency.
 - Administer one (1) or more educational videos, which will be provided by Agency, pertaining to HAF assistance, the loan documents, and the loan signing process.
 - Loan signing ceremony capabilities, in any of: in-person, mobile, or remote online.
- Notary Services provided by Applicant via in person, mobile, or via Remote Online Notarization (“RON”). This requirement may be satisfied if Applicant is pursuing a notary certification and/or can arrange for in person, mobile, or RON notary services.
- Applicants must have policies and procedures in place for handling and disposing of Personally Identifiable Information (PII).
- Applicants must have policies and procedures in place for the recovery of the destruction of program information as a result of natural or man-made disaster.
- For Homeownership Centers only: Agency may assign HAF applicants that request counseling services or need assistance to Homeownership Centers to begin, complete, or follow up on their applications.

2.4.2 Application Intake Assistance Anticipated Reporting Requirements

Grant reporting required for HAF intake includes but is not limited to:

- Track and provide quarterly reports to Agency. Sample Tracking Reports are attached as Attachment B (Sample Grant Agreement).
- Quarterly, annual, and ad hoc data and reports to support Agency’s state, federal, and U.S. Treasury reporting and auditing requirements, which Agency will further define or request during the grant term upon Agency receiving guidance on these topics.
- Homeowner demographic information; Agency will supply requested data points Grantees.
- Applicant will be subject to in person or virtual procedure and/or documentation audits at the request of Agency, the United States Treasury, the Comptroller General of the United States, Governmental Accountability Office, Congressional Oversight Panel, the office of the Special Inspector General, or agents, at any time during the Agreement term and for a period of five years after the Agreement term.
- For Homeownership Centers only: the number of households you successfully helped with reinstatement and loss mitigation through servicer-provided or other programs (not HAF) during the Agreement term.

2.4.3 Application Intake Assistance Support from Agency

Support to be provided by the Agency for HAF intake includes but is not limited to:

- An online application web form, secure email, and/or secure file exchange system.
- Program documentation, factsheets, and eligibility requirements.
- An account to return original loan documents via UPS.
- Funding for up to two (2) Remote Online Notary Certifications.

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- Mandatory virtual or in-person staff training for grantees based upon category of applicant (homeownership centers and non-homeownership centers), as needed by the Grantee. Trainings will take place virtually or in-person following any applicable COVID-19 guidance.
- On-going technical support to Grantee based upon category of applicant (homeownership centers and non-homeownership centers).
- For Homeownership Centers providing intake assistance when the HAF programs open to higher volumes of applications, access to the HAF program system and referrals of homeowners that need additional assistance with applications.

Agency and Grantee shall mutually agree upon schedule of Services.

2.5 GRANTEE PAYMENT

2.5.1 Track One (Direct Outreach Activities). Agency will compensate Applicant for the following outreach activities, subject to approval by the Agency, at the following rates:

Activity	Rate
Radio / TV / Print Advertisement (requires cross collaboration with Agency and final Agency approval). Any award will be based upon quoted or wholesale rate to Applicant, as to be determined and approved by Agency.	Varied \$5,000 max award
Video Content Accessible to the Public (requires cross collaboration with Agency and final Agency approval). Agency anticipates content will be substantive and educational, rather than a short video posting.	\$200 max per video \$1,000 max award
Telephone Campaign, dependent on call list (minimum 50+ calls to unique homeowners per campaign)	\$250 max per campaign \$1,000 max award
Email Campaign, dependent on email list (minimum 100+ unique homeowners per campaign)	\$100 max per campaign \$500 max award
Print Material: Pamphlets, Brochures, Newsletters, etc. The maximum includes any design, printing, postage, or other costs. Materials must also be made available in digital format at no additional cost to Agency.	Actual third-party costs incurred \$1,000 max award
Social Media / Digital Media Content. Requires Agency consultation and final approval. Agency anticipates content will be substantive, rather than a short posting with a link to other content.	\$150 max award
In person outreach or sign-up clinics. \$50 per unique primary residence as evidenced by a registration or sign in sheet listing names and addresses.	\$500 max per event \$3,000 max award
Virtual outreach or sign-up clinics. \$25 per unique primary residence as evidenced by a registration form listing names and addresses.	\$500 max per event \$3,000 max award

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2.5.2 Track Two (Application Intake Assistance). Agency will compensate Applicant for the following intake activities, subject to approval by the Agency, at the following rates:

Activity	Rate
<p>Fully Completed HAF Applications Submitted in the Correct Phase of HAF Operations. An application is only considered complete if: 1) the application form, authorization form, and any attestations are complete and signed by the homeowner(s); 2) all supporting documents are submitted; and 3) the full packet is entered and submitted through the Agency’s online form or portal.</p>	<p>\$100.00 per application</p>
<p>Fully Completed and Approved Quarterly Income Certification (Only for Participants in the Forward Payment Assistance Program Hardship Path)</p>	<p>\$25.00 per quarterly participant certification</p>
<p>Notary Services: In Person or Mobile (pursuant to OAR 160-100-0400). Agency will pay per notarized document instead of notarial act. For example, witnessing the signature of two borrowers on a single mortgage instrument would be one document even though the notary would be witnessing two signatures (two notarial acts). * Please note: grantee may not charge a fee if you signed the waiver on the notary application (call 503-986-2200 to verify or change your waiver status)</p>	<p>\$10 per document No max award</p>
<p>Notary Services: Remote Online Notarization (pursuant to OAR 160-100-0400). See details above.</p>	<p>\$25 per document No max award</p>
<p>Notary Services: Travel costs to perform a mobile notary act. Agency will pay the applicable IRS travel reimbursement rates for miles driven for a Notarial Event if the transaction is fully and successfully completed by the notary.</p>	<p>IRS mileage rates applicable at the time of travel</p>
<p>Successful certification of additional Remote Online Notaries (“RON”)</p>	<p>\$100 per new RON certification (up to two)</p>

2.5.3 Quarterly Reporting and Payments. To be paid for activities conducted in any quarter, Grantee must submit an invoice and its required quarterly reporting of activities completed under the grant track(s). Payments will be made through the duration of the term, up to the Award not-to-exceed amount established based upon each approved Application and outlined in any executed Grant Agreement. Additional information is available in the Sample Grant Agreement included as Attachment B.

2.5.4 Conflicts of Interest. When an actual or perceived conflict of interest exists, Grantee must provide a written disclosure to its clients revealing the conflict and stating that clients are under no obligation to receive additional services from Grantee. Grantee must retain a copy of any signed disclosures in the client file. Potential conflicts of interests include but are not limited to cases when Grantee, its employees, board members, or volunteers:

- Is an immediate family member (parent, grandparent, spouse or partner, child, or grandchild, by blood or marriage);
- Owns, co-owns, or resides in the subject property of any client;

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- Accepts a fee from the client for real estate or other services such as listing or selling property, originating or refinancing loans secured to the client's property, or negotiating a short sale, loan modification or workout for loans secured to the client's property;
- Is the beneficiary, holder, or servicer of a client's loan;
- Receives a fee from a third party such as a mortgage lenders, servicer or investor, or real estate agent.
- Has other business or personal financial interest in a client, or has an immediate family member with a financial interest in a client.

SECTION 3: APPLICATION REQUIREMENTS

3.1 MINIMUM APPLICANT REQUIREMENTS

To be considered for evaluation, Applicant must:

- ✓ Be an Eligible Organization.
- ✓ Complete and submit the information requested on the Application Info Sheet (Attachment A) and in compliance with Section 2.3 Grant Activities.
- ✓ Complete the additional RFA requirements, which includes but is not limited to the Application Requirements in this Section 3.

3.2 MINIMUM SUBMISSION REQUIREMENTS

3.2.1 Application Submissions

To be considered for evaluation, an Application must contain each of the following elements (further detailed in Application Requirements section below):

- Applicant Info Sheet (Attachment A)
- Disclosure Exemption Affidavit (Attachment C), as applicable
- Response to the Evaluation Criteria (Section 4.8.3)
- Culturally Specific Organization (Attachment 1), as applicable

3.2.2 Application Format

Applicant shall submit one (1) electronic copy of its Application to OHCS.Contracts@oregon.gov as an attachment by the Closing Date/Time on the Cover Page. Please reference RFA #7091 in the Subject Line of all e-email communications.

3.2.3 Authorized Representative

Failure of the authorized representative to sign the Application may subject the Application to rejection by Agency.

3.2.4 Additional Information

The following additional information applies:

- Applications are limited to one (1) per Eligible Organization.

3.2.5 APPLICATION PAGE LIMITS

Application is limited to 8 single-sided sheets of paper or 4 double-sided sheets of paper. Any pages exceeding this limit will not be provided to the evaluation committee or considered in the evaluation. The following items do not count toward the page limit:

- Applicant Info Sheet (Attachment A)
- Disclosure Exemption Affidavit (Attachment C)
- Response to Evaluation Criteria, Section 4.8.3
- Culturally Specific Organization (Attachment 1), as applicable

SECTION 4: SOLICITATION PROCESS

4.1 PUBLIC NOTICE

The RFA, including all Addenda and attachments, is published on OHCS' Procurement website at <https://www.oregon.gov/ohcs/procurement/Pages/procurement-opportunities.aspx>.

Agency shall advertise all Addenda, if any, on its website. Prospective Applicant is solely responsible for checking the website to determine whether or not any Addenda have been issued. Addenda are incorporated into the RFA by this reference.

RFA documents will not be mailed to prospective Applicants.

4.2 QUESTIONS / REQUESTS FOR CLARIFICATIONS

All inquiries, whether relating to the RFA process, administration, deadline or method of award, or to the intent or technical aspects of the RFA must:

- Be delivered to the SPC via email ;
- Reference the RFA number;
- Identify Applicant's name and contact information;
- Refer to the specific area of the RFA being questioned (i.e. page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the Schedule.

4.3 PROTESTS

4.3.1 Protests to RFA

Prior to Closing, prospective Applicant may submit a written protest of anything contained in this RFA. This is prospective Applicant's only opportunity to protest the provisions of the RFA, except that Applicant may protest Addenda as provided below and Applicant may take exception to the terms and conditions of the Sample Grant Agreement (Attachment B) marked as negotiable as set forth in the Negotiations Section.

4.3.2 Protests to Addenda

Prospective Applicant may submit a written protest of anything contained in the respective Addendum. Protests to Addenda, if issued, must be submitted by 5 p.m. Pacific Time of the second Business Day or the date/time specified in the respective Addendum, or they will not be considered. Protests of matters not added or modified by the respective Addendum will not be considered.

4.3.3 All Protests must:

- Comply with procedure under OAR 813-005-0025;
- Be delivered to the SPC via email or hard copy;
- Reference the RFA number;
- Identify prospective Applicant's name and contact information;
- Be sent by an authorized representative;
- State the reason for the protest, including:
 - the grounds that demonstrate how the Procurement Process is contrary to law, Unnecessarily Restrictive, legally flawed, or improperly specifies a brand name; and
 - evidence or documentation that supports the grounds on which the protest is based
- State the proposed changes to the RFA provisions or other relief sought;
- Protests to the RFA must be received by the due date and time identified in the Schedule; and
- Protests to Addenda must be received by the due date identified in the respective Addendum.

4.3.4 Protest Response

Agency will endeavor to respond to all protests submitted in a timely manner while giving due consideration to the nature of the protests. Protests that do not comply with OAR 813-005-0025 and this Section 4 of the RFA will not be considered.

4.4 APPLICATION DELIVERY OPTIONS

Applicant is solely responsible for ensuring its Application is received by the SPC in accordance with the RFA requirements before Closing. Agency is not responsible for any delays in mail or by common carriers or by transmission errors (electronic or otherwise) or delays or mistaken delivery. Applications submitted by any means not authorized may be rejected.

4.5 APPLICATION MODIFICATION OR WITHDRAWAL

If an Applicant wishes to make modifications to a submitted Application, it must submit its modification in the authorized method listed Section 3. To be effective the notice must include the RFA number and be submitted to the SPC prior to Closing.

If an Applicant wishes to withdraw a submitted Application, it must submit a Written notice signed by an authorized representative of its intent to withdraw to the SPC via email prior to closing in accordance with OAR 137-047-0440. To be effective the notice must include the RFA number.

4.6 APPLICATION DUE

An Application (including all required submittal items) must be received by the SPC on or before Closing. All Application modifications or withdrawals must be received prior to Closing.

An Application received after Closing is considered LATE and will NOT be accepted for evaluation. A late Application will be returned to the Applicant or destroyed.

4.7 APPLICATION REJECTION

Only complete Applications will be evaluated. Additionally, Agency may reject an Application for any of the following reasons:

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- Applicant fails to substantially comply with all prescribed RFA procedures and requirements, including but not limited to the requirement that Applicant’s authorized representative sign the Application, although an electronic signature is acceptable.
- Applicant has liquidated and delinquent debt owed to the State or any department or agency of the State.
- Applicant fails to meet the responsibility requirements of this RFA.
- Applicant makes any contact regarding this RFA with State representatives such as State employees or officials other than the SPC or those the SPC authorizes, or inappropriate contact with the SPC.
- Applicant attempts to influence a member of the Evaluation Committee.
- Application is conditioned on Agency’s acceptance of any other terms and conditions or rights to negotiate any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation in the RFA or Addenda.

4.8 EVALUATION PROCESS

4.8.1. Responsiveness Determination

An Application received prior to Closing will be reviewed to determine if it is responsive to all RFA requirements including compliance with Minimum Applicant Requirements (Section 3.1). If the Application is unclear, the SPC may request clarification from Applicant or seek additional information, as deemed necessary by Agency. Applicant must respond within three (3) working days of the date an email has been sent from Agency. If the SPC finds the Application non-responsive, the Application may be rejected, however, Agency may waive mistakes in accordance with OAR 137-047-0470 and OAR chapter 813, divisions 5 and 6.

Agency may use its discretionary action in accordance with OAR 813-006-0040.

4.8.2 Evaluation Overview

Members of an Evaluation Committee will independently evaluate each Application meeting all responsiveness requirements. The size of the Evaluation Committee will be determined by the Agency. Evaluation Committee members may change and Agency may have additional or fewer evaluators. Evaluator(s) will assign a PASS or FAIL determination or score for each evaluation criterion based on the categories described below. Complete Applications will then be evaluated based on applicability to the evaluation criteria.

To be eligible for an Award, the Applicant must pass all required evaluation items and receive a combined evaluation score over 25 points and qualify for an Award under Section 4.9.

4.8.3 Evaluation Criteria

Required Questions for All Applicants:

If you are applying for both Track One and Track Two, please provide responses related to each track in response to the evaluation criteria in this section.

1. Eligible Organization (PASS/FAIL)

Applicant must be:

- An Eligible Organization and submit a complete Attachment A.

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- 2. Does your organization have a Language Access Plan to serve individuals with limited English speaking and writing proficiency (PASS/FAIL)?**

- 3. Experience. (10 Max Points)**

Are you currently performing any of these services for the track(s) for which you are applying? Please provide a brief description (by track(s) or by service) on how you perform these services and for how long.

- 4. Service Capacity – (10 Max Preference Points)**

How many individuals do you project to serve related to the Grant Activities for the track(s)?

- 5. Targeted Organization – Preference Points (20 Max Preference Points)**

Is your organization a Rural Organization? If so, what rural areas do you serve in Oregon?

- 6. Targeted Organization – Preference Points (20 Max Preference Points)**

Is your organization a Culturally Specific Organization?

Applicant must complete and return the Culturally Specific Organization (Attachment 1) and supporting documents with its Application if Applicant desires to qualify as a Culturally Specific Organization under this RFA.

If Applicant has already certified with Agency as a Culturally Specific Organization, Applicant must note that in Attachment 1 and return the form as described in the RFA.

- 7. Targeted Communities – Preference Points (20 Max Preference Points):**

Explain how your organization serves Socially Disadvantaged Individuals, as defined in this RFA. Which Socially Disadvantaged Individuals does your organization serve, and how?

Additional Questions for Track One Only:

- 8. For Track One Outreach Applicants – (15 Max Points)**

Please provide a concise summary of your focus outreach plan, in relation to the activities eligible for payment, including the target audience(s) and an estimate of households that may be reached.

Additional Questions for Track Two Only:

- 9. For Track Two Application Intake Assistance Applicants only: Does your organization have policies and procedures in place for the recovery or the destruction of program information as a result of natural or man-made disaster (PASS/FAIL)?**

- 10. For Track Two Application Intake Assistance Applicants only: Does your organization have policies and procedures in place for handling and disposing of Personal Identifiable Information (PII) (PASS/FAIL)?**

11. For Track Two Application Intake Assistance Applicants only: does your organization have current or anticipated administrative capacity to perform application intake, including all necessary follow up activities and quarterly income certification (PASS/FAIL)?

12. For Track Two Application Intake Assistance Applicants only: does your organization have technological capacity to deliver application intake assistance objectives within 30 calendar days of Award as more precisely described in Section 2.4.1 (PASS/FAIL)?

13. For Track Two Application Intake Assistance Applicants only – (15 Max Points)

Please provide a concise summary of services your organization intends to provide, in relation to activities eligible for payment, and an estimate of the number of applications your organization may submit on behalf of eligible homeowners.

4.9 SELECTION PROCESS

Agency will be evaluating Applications based on the process identified in Section 4.8, and then selected on a first come first serve basis based on application date, subject to available funding, and in accordance with the requirements in this RFA and applicable ORSs and OARs, preference will be given to cover geographic locations statewide, rural communities, Culturally Specific Organizations, those serving Socially Disadvantaged Individuals, and Applicants that serve larger communities or networks. Agency reserves the right, at its sole discretion, to stop accepting applications for a geographic area that has full capacity of Services. Agency will post a notice to Agency’s website (OHCS at <https://www.oregon.gov/ohcs/procurement/Pages/procurement-opportunities.aspx>) of open geographic areas where Agency is accepting applications for this RFA. Agency will update its website when a geographic area is full and additional applications cannot be evaluated for those services areas.

If Agency approves an Application, in whole or part, Agency will indicate which of the proposed track or tracks have been approved and the amount of funds the Applicant is eligible for reimbursement in the Agreement.

SECTION 5: AWARD AND NEGOTIATION

5.1 AWARD NOTIFICATION PROCESS

5.1.1 Award Consideration

Agency, if it makes an Award of funding pursuant to this RFA, shall enter into an Agreement with the successful Applicant in accordance with the process described in Section 4. Agency may award less than the full Grant Activities defined in this RFA.

5.1.2 Notice of Award

Agency will notify all Applicants that Agency intends to award funds to the selected Applicant(s), via its Agency’s (OHCS) website, subject to successful negotiation of any negotiable provisions of the Agreement.

5.2 FUNDING AWARD PROTEST

5.2.1 Protest Submission

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An Affected Applicant may submit a written protest in accordance with procedures and timeline outlined in OAR 813-005-0025.

5.2.2 Response to Protest

Agency will address all timely submitted protests within a reasonable time and will issue a Written decision to the respective Applicant. Protests that do not include the required information may not be considered by Agency.

5.2.3 APPLICATION DELIVERY OPTIONS

Applicant is solely responsible for ensuring its Application is received by the SPC in accordance with the RFA requirements before Closing. Agency is not responsible for any delays in mail or by common carriers or by transmission errors (electronic or otherwise) or delays or mistaken delivery. Applications submitted by any means not authorized may be rejected.

5.3 APPARENT SUCCESSFUL APPLICANT SUBMISSION REQUIREMENTS

Applicant who is selected for an Award under this RFA will be required to submit additional information and comply with the following:

5.3.1 Insurance

Prior to execution of an Agreement, Applicant shall secure and demonstrate to Agency proof of insurance as required in this RFA or as negotiated. Insurance Requirements are found in Exhibit B of Attachment B.

5.3.2 Employer or Taxpayer Identification Number

Applicant shall provide its federal Employer Identification Number ("EIN") or its Taxpayer Identification Number ("TIN") and backup withholding status on a completed W-9 form when requested by Agency or when the backup withholding status or any other relevant information of Applicant has changed since the last submitted W-9 form, if any.

5.3.3 Business Registry

If selected for Award, Applicant must be validly existing, in good standing, and duly authorized by the State of Oregon to transact business in the State of Oregon before executing the Agreement. Visit <http://sos.oregon.gov/business/pages/register.aspx> for Oregon Business Registry information.

5.4 AGREEMENT NEGOTIATION

5.4.1 Negotiation

By submitting an Application, Applicant agrees to comply with the requirements of the RFA, including the terms and conditions of the Sample Grant Agreement (Attachment B), with the exception of those terms reserved for negotiation such as the Grant Activities and Insurance Requirements. Applicant must review the attached Sample Grant Agreement (Attachment B) and note exceptions. Unless Applicant notes exceptions in its Application, Agency intends to enter into a Sample Grant Agreement (Attachment B) with the successful Applicant substantially in the form set forth in the Sample Grant Agreement (Attachment B). It may be possible to negotiate some provisions of the final Agreement; however, many provisions cannot be changed. Applicant is cautioned that Agency believes modifications to the standard provisions constitute increased risk and increased cost to the State. Therefore, Agency may consider the scope of requested exceptions in the evaluation of Applications.

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In the event that the parties have not reached mutually agreeable terms within 30 calendar days, Agency may terminate Negotiations.

SECTION 6: ADDITIONAL INFORMATION

6.1 GOVERNING LAWS AND REGULATIONS

This RFA is governed by the laws of the State of Oregon. Venue for any administrative or judicial action relating to this RFA, evaluation and award is the Circuit Court of Marion County for the State of Oregon; provided, however, if a proceeding must be brought in a federal forum, then it must be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this Section be construed as a waiver by the State of Oregon of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the eleventh amendment to the Constitution of the United States or otherwise, to or from any Claim or consent to the jurisdiction of any court.

6.2 PUBLIC INFORMATION

All Applications are public record and are subject to public inspection after Agency issues the Award. If an Applicant believes that any portion of its Application contains any information that is a trade secret under ORS Chapter 192.345(2) or otherwise is exempt from disclosure under the Oregon Public Records Law (ORS 192.311 through 192.478), Applicant must complete and submit the Disclosure Exemption Affidavit (Attachment C) and a fully redacted version of its Application.

An Applicant is cautioned that budget information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.311 through 192.478) and identifying the Application, in whole, as exempt from disclosure is not acceptable. Agency advises each Applicant to consult with its own legal counsel regarding disclosure issues.

If Applicant fails to identify the portions of the Application that an Applicant claims are exempt from disclosure, the Applicant has waived any future claim of non-disclosure of that information.

6.3 CANCELLATION OF RFA; REJECTION OF APPLICATION; NO DAMAGES.

Agency may reject any or all Applications in-whole or in-part, or may cancel this RFA at any time when the rejection or cancellation is in the best interest of the State or Agency, as determined by Agency. Neither the State nor Agency is liable to any Applicant for any loss or expense caused by or resulting from the delay, suspension, or cancellation of the RFA, award, or rejection of any Application.

6.4 COST OF SUBMITTING AN APPLICATION

Applicant must pay all the costs in submitting its Application, including, but not limited to, the costs to prepare and submit the Application, costs of samples and other supporting materials, costs to participate in demonstrations, or costs associated with protests.

6.5 CHECKLIST DISCLAIMER

Any checklists that may be contained in this RFA are provided only as a courtesy to prospective Applicant. Agency makes no representation as to the completeness or accuracy of any Checklist. Prospective Applicant is solely responsible for reviewing and understanding the RFA and complying with all the requirements of this RFA, whether listed in a checklist or not. Neither the State nor Agency is liable for any claims, or subject to any defenses, asserted by Applicant based upon, resulting from, or related to, Applicant's failure to comprehend all requirements of this RFA.