



WESTMORELAND COUNTY HOUSING AUTHORITY (WCHA)

REQUEST FOR QUALIFICATIONS (RFQ) FOR PROFESSIONAL AFFORDABLE HOUSING CONSULTANTS INDEFINITE QUANTITY CONTRACT (2026-2030)

RFP-2026-18.1.1

**SUBMISSION DEADLINE:
MARCH 27, 2026 – 10:00 A.M. (eastern standard time)**

Westmoreland County Housing Authority

167 South Greengate Road

Greensburg, PA 15601

Tel (724) 832-7248

Fax (724) 836-0988

Website: www.wchaonline.com

THE WESTMORELAND COUNTY HOUSING AUTHORITY CONDUCTS ITS PROCUREMENT ACTIVITIES PURSUANT TO 24 CFR PART 85.36, APPLICABLE FEDERAL AND STATE LAWS, AND THE AUTHORITY'S PROCUREMENT POLICY. THESE DOCUMENTS ARE AVAILABLE FOR REVIEW AT THE AUTHORITY'S OFFICE LOCATED AT 17 GREENGATE ROAD, GREENSBURG, PA 15601.

REQUEST FOR PROPOSAL
FOR
AFFORDABLE HOUSING CONSULTING SERVICES

OVERVIEW:

The Westmoreland County Housing Authority (WCHA) is requesting qualifications and proposals from consulting firms with a strong background in developing and preserving affordable, family and elderly housing with the context of a Public Housing Authority operating through instrumentalities or affiliates of such Public Housing Authority. Established in 1941, Westmoreland County Housing Authority (WCHA) has celebrated more than 80 years of providing safe, affordable housing for families and seniors throughout Westmoreland County. The WCHA and Non—Profit Affiliates currently own and manage forty-two developments consisting of 2,492 affordable housing units.

The Westmoreland County Housing Authority (WCHA) seeks a Consultant(s) who can analyze opportunities while preparing and reviewing documents necessary to rehabilitate, improve, and expand the inventory of (WCHA) affordable housing. Experience in HUD – programs, FHA – Multifamily Finance, USDA Financing, PHFA – Multi-Family Financing, Federal Home Loan Banking Programs, Mixed-Income development, Tax Credit Housing Development (LIHTC, Historic, New Market), Year-15 Expiring Use Analysis, Affordable Housing Development, Real Estate Acquisition, or Conveyance, HUD Disposition and Demolition, HUD – Environmental Assessment and Review Records (ERR's) is essential, and WCHA may assign additional related work as deemed necessary.

PUBLIC NOTICE:

**WESTMORELAND COUNTY HOUSING AUTHORITY
REQUEST FOR QUALIFICATIONS
FOR
PROFESSIONAL AFFORDABLE HOUSING CONSULTANTS
INDEFINITE QUANTITY CONTRACT (2026-2030)**

The Westmoreland County Housing Authority (WCHA) is requesting Statement of Qualifications from Professional Affordable Housing Consulting Firms to perform various developmental supportive services associated with the Affordable Housing Preservation and Development.

Request for Qualification solicitation documents can be obtained from the WCHA via the www.wchaonline.com website, "Procurement Module – Current Solicitations".

Interested respondents can view the documents at the WCHA – Administration Office located at 167 South Greengate Road, Greensburg, PA 15601. Questions may be directed to Mr. Erik Spiegel, COO/Director of A&E Services at eriks@wchaonline.com and to Mr. Ed Primm, Director of Development Services at eprimm@wchaonline.com. An electronic copy (PDF) can be secured from the WCHA website, www.wchaonline.com, "Procurement Module – Current Solicitations".

The Westmoreland County Housing Authority is an equal employer, and attention is called to all respondents that compliance with all applicable Equal Employment Opportunity requirements shall be adhered to. This includes strict compliance with Executive Order 11246, as amended; MBE Nondiscrimination-Executive Order 11625; WBE-Executive Order 12138; Section 3 of the HUD Act of 1968, and the Civil Rights Act of 1964.

Interested respondents are required to respond by proposal submission (satisfying the requirements of this RFQ-invitation) on or before **Friday, March 27, 2026, at 10:00 A.M.** Submission shall be either by certified mail or express carrier (UPS or FEDEX) to the WCHA Administration Office identified above to the attention of Mr. Erik Spiegel, COO/Director of A&E Services.

Michael L. Washowich
Executive Director

GENERAL RPF INFORMATION

A. Instructions on Proposal Submission:

1. Addendums, Clarifications & Additional Information:

Prospective offerors are required to notify WCHA of their intent to respond to this solicitation via email to Erik Spiegel, COO/Director of A&E Services at eriks@wchaonline.com and Ed Primm, Director of Development Services at eprimm@wchaonline.com. All questions pertaining to this Request for Qualification shall be submitted via email to WCHA Attn: Erik Spiegel, COO/Director of A&E Services at eriks@wchaonline.com and Ed Primm, Director of Development Services at eprimm@wchaonline.com. All addendums, clarifications and additional information pertaining to this solicitation shall be posted on the Housing Authority website www.wchaonline.com. Prospective offerors are advised to check the Housing Authority's website before submitting their bid. WCHA assumes no responsibility for notification to potential respondents of the availability of addendums, clarifications and additional information.

2. CLOSING SUBMISSION DATE:

Proposals must be submitted and received no later than 10:00 A.M. on March 27, 2026.

3. Inquiries concerning this RFQ should be directed to:

Erik Spiegel, COO/Director of A&E Services at eriks@wchaonline.com
Ed Primm, Director of Development Services at eprimm@wchaonline.com

Westmoreland County Housing Authority
167 South Greengate Road
Greensburg, Pennsylvania 15601-6392
(724) 832-7248
eriks@wchaonline.com

4. Conditions of Proposal:

All costs incurred in the preparation of a proposal responding to this RFP will be the responsibility of the Offeror and will not be reimbursed by the Westmoreland County Housing Authority.

5. Instructions to Prospective Consultants

Your proposal should be addressed as follows:

Westmoreland County Housing Authority
167 South Greengate Road
Greensburg, PA 15601-6392

It is important the Offeror's proposal be submitted in two (2) sealed envelopes - the outer envelope should be addressed to the Westmorland County Housing Authority, 167 South Greengate Road, Greensburg, PA 15601-6392, while the inner envelope shall be clearly marked in the lower left-hand corner with the following information:

“Proposal for AFFORDABLE HOUSING CONSULTING SERVICES”

Failure to do so may result in premature disclosure of your proposal.

It is the responsibility of the Offeror to ensure that the proposal is received by the date and time specified.

Proposals received after the stated date and time will not be considered in the selection process.

6. Right to Reject:

The Westmoreland County Housing Authority reserves the right to reject any and all proposals received in response to this RFQ. A contract for the accepted proposal will be based upon the factors described in this RFQ.

7. Small, Minority-Owned, and/or Women's Business Enterprises:

The Westmoreland County Housing Authority will make efforts to utilize small, minority-owned, and/or women's business enterprises. An offeror qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration. (Appendix B.)

8. Section 3 Business Concerns:

The Westmoreland County Housing Authority promotes the utilization of business concerns which are in or owned in substantial part by persons residing in the Section 3 area and promotes job training and employment opportunities for qualified, lower income, Section 3 area residents. (See Appendix A.)

9. Notification of Award:

It is expected that a decision selecting the successful consulting firm(s) will be made within thirty (30) days of the closing date for the receipt of proposals. All Offerors submitting proposals in response to this Request for Proposal will be informed, in writing, of the name of the successful consultant(s).

It is expected that the contract shall be a two-year contract with the option to mutually extend said contract on a yearly basis at no additional increase in fees for a total contract length of 5 years.

SERVICES TO BE PROVIDED:

The consultant will, at the request of the Authority, provide services regarding the preservation / rehabilitation of existing housing units and development of new plans or programs to expand the affordable housing inventory currently under WCHA control, or available through collaboration with multiple stakeholders. The following represents a general scope of programmatic knowledge of housing and finance programs the WCHA may need assistance with during the contract period. The following programs include but are not limited to:

1. HUD – Environmental Regulations related to housing preservation and development.
2. HUD – Rental Assistance Demonstration (RAD) program
3. HUD – Project Based Rental Assistance program.
4. HUD – Community Development Block Grant (CDBG) program
5. HUD – Section 8 Voucher, Section 8 New Construction, and Public Housing programs
6. HUD – Procurement Standards
7. HUD – Demolition and Disposition regulations
8. HUD – HOME Investment Partnerships program
9. HUD – Veterans Affairs Supportive Housing (HUD-VASH) program
10. HUD – Mixed Financed Development program
11. HUD – FHA Financing programs
12. IRS – Low Income Housing Tax Credit (LIHTC) program – (4% AND 9%) administered by the Pennsylvania Housing Finance Agency
13. IRS – New Market Tax Credit Program
14. IRS – Historic Rehabilitation Tax Credit program
15. Federal Home Loan Bank Act & Financing
16. PHFA – Optional Affordable Housing Funding program (ACT 137 Funds)
17. PHFA – Penn HOMES funding program
18. PA-DCED – Grant and Loan programs
19. United States Department of Agriculture and Development (USDA) – Grant and Loan programs

Consultant services may encompass but not be limited to the following:

1. Preparation of Environmental Review Records
2. Preparation of Grant and Loan Applications
3. Preparation of LIHTC Applications
4. Preparation of financial forecasts, feasibility analyses, operating, and development budgets related to various developments and financing mechanisms.
5. Preparation of preservation strategies as related to all WCHA and Affiliate – Non-Profit owned properties.
6. Preparation of acquisitions & preservation strategies related to potential property acquisitions proposed by the WCHA and Affiliate – Non-Profit
7. Provide technical and administrative services related to the syndication of low-income housing tax credits in conjunction with projects under development or to be developed. Services may include the preparation, review and consultation regarding documents associated with partnerships, real estate acquisition, disposition, development, construction, municipal approvals, tax credit syndication, bond financing, HUD transactions and specific covenant provision.
8. Consult with bond counsel, investment bankers, tax credit syndicators, developers, developer legal counsel, HUD, PHFA, municipal entities, and other entities deemed appropriate by WCHA for the purpose of preserving the interests of the Authority, and insuring conformity with local, state and federal rules and regulations affecting affordable housing.
9. Work with WCHA and other related professionals in the development of a coordinated approach to the overall development of affordable housing in areas not traditionally served by WCHA and assist WCHA in its negotiations with non-profit or for-profit developers and property owners.
10. Provide technical assistance related to the Rental Assistance Demonstration (RAD) program.
11. Any other serves as identified by WCHA.

CRITERIA FOR SELECTION:

Demonstrated experience through a portfolio of successful projects and related assignments representing Public Housing Authorities, or instrumentalities, and affiliated entities of housing authorities. Portfolio shall demonstrate professional consulting services performed with the majority of the program and related services identified related to affordable multi-family housing.

Demonstrated experience and interaction with HUD, PHFA, PA-DCED, USDA and other applicable state funding agencies and local governments in the preservation and creation of affordable multi-family housing.

Demonstrated ability to represent WCHA without conflicts with other business transactions.

Experience and Expertise of Key Personnel and Number of Employees assigned to work WCHA and its Non-Profit Affiliate(s).

MINIMUM QUALIFICATIONS:

The qualifications the Westmoreland County Housing Authority is seeking include the following:

1. Each member of the consultant group senior management must have on average a minimum of 15 years of demonstrated experience through a portfolio of successful projects and related assignments representing Public Housing Authority, or instrumentalities, and affiliated entities of housing authorities.
2. Firm shall carry and provide a Certificate of Professional Liability Insurance in the amount of one million dollars.
3. At all times, the firm and all individuals assigned to perform consulting services must be free from conflicts of interest because of any other engagements, work performed or personal or business dealings. Alternatively, any conflict must be disclosed to the Authority for waiver consideration.

EVALUATION CRITERIA/FACTORS:

Proposer must meet the minimum qualification set forth as stated above. The Westmoreland County Housing Authority will assess the aspects of the proposal in the following manner.

<u>FACTORS</u>	<u>POINT RANGE</u>
1. Relevant experience of the firm with: a) HUD – Programs and Services Identified b) IRS – Tax Credit – Affordable Housing Development Services and Programs c) PHFA – Housing Finance Program and Related Services d) USDA – Housing Finance Programs and Related Services e) FHA – Programs and Services f) FHLB – Programs and Services	0-30
2. Qualifications of individuals assigned as primary counsel a) Ownership or Senior Officers assigned to WCHA account b) Affiliate Employees assigned to WCHA account	0-10
3. Capability and Structure of Firm: a) Firm Size b) Primary State of Consulting Service c) Clients in Commonwealth of Pennsylvania i. Public Housing Authorities ii. Private Developers iii. Non-Profits	0-10
4. Proposed fee schedule for all employees assigned to contract a) Hourly costs comparison to high, low and average of proposals received. b) Lump Sum Fees for Specific Assignments Identified i. Year 15 Expiring Use Analysis (site specific) ii. IRS/PHFA LIHTC Development (senior development) (9% Application Phase to Closing) iii. IRS/PHFA LIHTC Development (family development) (9% Application Phase to Closing) iv. IRS/PHFA LIHTC Development (preservation project) (9% Application Phase to Closing) v. Federal Home Loan Bank Application (site specific) vi. FHA – Loan Applications (site specific) (221.d.4, 223.f)	0-20
5. Responsiveness and completeness of the proposal to RFP.	0-10
6. Section 3 Business Entity	0 or 5
7. Small – Minority – Women Enterprise	0 or 5
8. Interview Presentation and Interaction with WCHA Evaluation Team	0-10
TOTAL POINTS AVAILABLE	100

The Westmoreland County Housing Authority may, at its discretion, request presentations by or meetings with any or all Offerors, to clarify or negotiate modifications to the Offeror's proposals.

The Westmoreland County Housing Authority reserves the right to make an award without further discussion of the proposals submitted. Therefore, proposals should be submitted initially on the most favorable terms, from both technical and price standpoints, which the Offeror can propose.

The Westmoreland County Housing Authority contemplates award of the contract to the responsible Offeror with the highest total points.

PROCEDURE FOR SELECTION:

The WCHA has designed a committee to review proposals and participate in an interview session with the consultants proposing. The Committee members will independently rate the proposals and interview sessions and offer their ranking of firms. The Committee led by the WCHA Executive Director may conduct negotiations with the two highest ranking firms to arise at a fair and reasonable fee schedule for AFFORDABLE HOUSING CONSULTING SERVICES, reimbursable expenses, and any other relevant costs associated with the estimated scope of legal services to be performed. The Committee may recommend approval of consulting contracts for one or both top ranked consultants if agreements are beneficial to the WCHA is agreed upon.

The WCHA Review Committee may be but not limited to the following personnel: Executive Director, COO/Director of A&E Services and Director of Development Services.

SUBMITTAL:

Submittals shall be prepared and submitted in a bound binder with tabbed sections and should include the following information:

Identify the specific members of your firm who will be assigned to work with the WCHA and describe their individual experiences with governmental, non-profit or Housing Authority bodies or groups. Include resumes for each person as well as name, address and telephone number of contact person.

List housing related authorities that company has worked for and represented applicable to this RFQ. List any significant accomplishments or contributions worth noting your company made to effectuate the growth of new housing assets under Authority control. Provide client name and telephone number and indicate the nature and length of relationship with the entity.

Indicate how your firm would handle potential conflicts of interest in matters involving other clients (example developers or financial institutions) participating or planning to participate in a WCHA financing or development.

Provide the hourly fee schedule for all employees and officers proposed for this account if hired as the Authority AFFORDABLE HOUSING CONSULTANT. Indicate reimbursable fees and costs and designate if there are separate or reimbursable charges for different types of services. Provide lump sum fees for the Authority to consider if a lump sum fee structure for a particular assignment was desired.

Describe availability of key personnel who will service the WCHA account.

Proposals may be judged non-responsive and removed from further consideration if any of the following occur:

1. The proposal is not received timely in accordance with the terms of this RFP.
2. The proposal does not follow the specified format.
3. The proposal does not include the Certifications.

APPENDICIES – TABLE OF CONTENTS:

Appendix A – Certifications

Appendix B – Section 3 Regulations

Appendix C – Form HUD-5369-B – Instructions to Offerors – Non- Construction

Appendix D – Form HUD-5370-C Section 1 – General Conditions for Non-Construction Contracts

Appendix E – Form HUD-5369-C – Certifications and Representations of Offerors – Non-Construction
Contract