



PUERTO RICO HOUSING
FINANCE AUTHORITY

PRHFA

GOVERNMENT OF PUERTO RICO

ADDENDUM #3

Request for Proposals (RFP) for
CASE MANAGEMENT SERVICES FOR HOME & HTF PROGRAMS ACTIVITIES

This Addendum is hereby included in and made part of the Request for Proposals for CASE MANAGEMENT SERVICES FOR HOME & HTF PROGRAMS ACTIVITIES, published on June 3, 2025 (RFP). This Addendum #3 addresses clarifications and questions received. The original RFP's Documents remain in full force and effect, except as modified by this Addendum. Proponents shall take this Addendum into consideration when preparing and submitting their Bids.

I. QUESTIONS/CLARIFICATIONS:

Question #1:

Workload Description and Volume of Projects: To accurately define the team structure, staffing levels, and resource allocation, we respectfully request more detailed information regarding the expected workload. Specifically: The estimated number of cases or households to be managed during the contract term.

Answer #1:

The number of units and/or projects is not predetermined. This will depend on the applicants for the funds. However, we estimate to have the following requests: Single-Family: 85 families (Rehab by Owner – 75 + TBRA- 10).

Question #2:

The average complexity or duration of each case size or scope of each rehabilitation project.

Answer #2:

For Single-Family: 1-4 bedrooms units; Multi-Family: 90-150 units per project.

Question #3:

The geographic distribution of the projects (e.g., number of municipalities or regions involved).

Answer #3:

The Case Manager must be prepared to provide the procured services throughout the Puerto Rican Archipelago. However, in relation to the HOME Municipal Housing Rehabilitation Initiative, we expect to select approximately 20 municipalities that would benefit from this activity.

Question #4:

The anticipated timeline or phasing of project starts and completions.

Answer #4:

There is no specific anticipated timeline for projects. Services may be required, as needed, at any time during the term of the contract. For more detailed information related to the tasks involved for each application, please see Exhibit A.

Question #5:

Whether multiple projects will be active concurrently, and if so, how many at a time. This information is critical for determining the number and type of personnel required to meet the RFP's expectations efficiently and cost-effectively.

Answer #5:

Yes, there will be several active projects concurrently. Services may be required for multiple units and/or projects at the same time or application cycle. This fiscal year we estimate to receive approximately 85 applications related to single-family activities, that include rehab by owner and TBRA.

Regarding the municipal initiative, we encourage proponents to visit our web page: www.afv.pr.gov, click on "Avisos" tab and review the documents related to the Notice of Funding Availability – HOME Program-Municipal Housing Rehabilitation by Owner Initiative at <https://www.afv.pr.gov/wp-content/uploads/2025/04/home-rehab-nofa-municipios-v5-clean-rev-9-abr-2025-eti-rev-jt-4-9.docx>.

Also, you can watch a recording of the May 6, 2025 Spanish presentation on our YouTube channel: <https://www.youtube.com/watch?v=XraQOxvURd0>

Question #6:

Standardized Cost Form: Section 6.5 requests a proposed budget including hourly rates, but no standardized format is provided. To ensure consistency and comparability across proposals, will PRHFA provide a cost proposal template or form that all respondents should use?

Answer #6:

As part of this addendum, PRHFA is providing a standardized cost form as Exhibit B.

Question #7:

Budget Ceiling or Funding Allocation: Is there a maximum budget or funding ceiling for this contract that respondents should consider when preparing their cost proposals?

Answer #7:

There is no pre-set budget or funding cap for the contract. The purpose of the RFP is precisely to obtain the costs of the requested services through competition. PRHFA reserves the right to contract the services once the proposals submitted have been analyzed.

Question #8:

Clarification on Evaluation Criteria: Section 7 lists "Overall approach to provide the Case Management Services" as a separate criterion worth 5 points. Could you clarify how this differs from the "Proposed Work Plan" criterion, which is worth 20 points?

Answer #8:

The “Overall approach to provide the Project Management Services” recognizes and rewards the combined fulfillment of the criteria described in RFP (includes the Proposed Work Plan as one of them). The better the criteria is fulfilled; the better the opportunity for proponents to received more points in their proposals.

Question #9:

Access to NOFA Document: Section 4.4 references the HOME Municipal Housing Rehabilitation Initiative NOFA (AFV-HOMEPR-2025-0002). Could you please provide a copy of or a link to this NOFA for reference?

Answer #9:

Regarding the municipal initiative, we encourage proponents to visit our web page: www.afv.pr.gov , click on “Avisos” tab and review the documents related to the Notice of Funding Availability – HOME Program-Municipal Housing Rehabilitation by Owner Initiative at <https://www.afv.pr.gov/wp-content/uploads/2025/04/home-rehab-nofa-municipios-v5-clean-rev-9-abr-2025-eti-rev-jt-4-9.docx>.

Also, you can watch a recording of the May 6, 2025 Spanish presentation on our YouTube channel: <https://www.youtube.com/watch?v=XraQOxvURd0>

Question #10:

Subcontracting Clarification: Section 6.3.3 states that joint ventures or consortiums are not allowed, but subcontracting may be permitted with written approval. Could you clarify whether subcontractors must be identified in the proposal, and if so, what documentation is required?

Answer #10:

It is not required to be included in the proposal but can be included. The following documentation is recommended: Certification that neither the company nor its officers are suspended or debarred (“Suspension & Debarment”) from doing business with the Federal Government, Certification that no conflict of interest exists should they be awarded the contract, Certification of compliance with the provisions of the Anti-Corruption Code for the New Puerto Rico (Act No. 2-2018, as amended), “Unique Entity ID” (UEI) and evidence of active registry in the System for Award Management (SAM) at www.sam.gov, Executive Order No. 14173 of January 21, 2025, “Ending Illegal Discrimination and Restoring Merit Based Opportunity”. Requirements of the Section 6.3 Background and description of services and personnel-RFP.

Question #11:

Insurance Requirements: Section 3.10 mentions minimum insurance coverage pursuant to the Puerto Rico Insurance Code. Could you please specify the types and minimum levels of insurance coverage required?

Answer #11:

Applicable Insurances with Hold Harmless Agreement, 30-day prior notice of cancellation, and Puerto Rico Housing Finance Authority as “Additional Insured”, for example: Commercial Liability, Automobile Liability, Employer’s Liability, Professional Liability.

Question #12:

Can PRHFA provide an estimated number / volume of beneficiary applications, housing units, or households to be processed under this contract? How many cases are expected to be processed with available funds?

Answer #12:

The number of units and/or projects is not predetermined. This will depend on the applicants for the funds. However, we estimate to have the following requests: Single-Family: 85 families (Rehab by Owner – 75 + TBRA- 10).

Question #13:

Does PRHFA have an estimated staffing level or recommended personnel-to case ratio to guide planning and resourcing?

Answer #13:

PRHFA do not have an estimated staffing level or recommended personnel-to case ratio. Please include in Exhibit B the proposed key staff. The PRHFA will evaluate the proposed key staff taking into consideration the proposed work plan, overall cost and overall approach to provide the Case Management Services.

Question #14:

Does PRHFA prefer a cost-per-application model, a time-and-materials hourly billing model, or a hybrid structure? (Note: in our experience this type of contract uses a hybrid structure)

Answer #14:

PRHFA prefers a cost-per-application model. As part of this addendum, PRHFA is providing a standardized cost form as Exhibit B.

Question #15:

Does PRHFA have an estimated average number of labor hours typically required to complete each case from intake to closure, including all compliance tasks? (Note: in our experience this type of contract is structured and billed by percentage of completion of a case, where a case is divided by key tasks and billed accordingly).

Answer #15:

As part of this addendum, PRHFA is providing an estimated average number of labor hours to complete each case. See Exhibit A.

Question #16:

Will PRHFA provide a standard invoice template or reporting tool for billing?

Answer #16:

No. Once the entity has been selected, PRHFA will inform any requirements or supporting document needed for invoicing process.

Question #17:

What is the expected processing time for invoice approval and disbursement, assuming complete documentation?

Answer #17:

Once selected, PRHFA will meet with the entity and coordinate so that payments can be received in the shortest possible time and in accordance with the requirements of the programs.

Question #18:

Will PRHFA define KPIs or deadlines for each task (e.g., eligibility determinations, inspections)? (Note: in our experience for this type of contract, a predetermined expected time (hours) per task is defined and billed accordingly)

Answer #18:

As part of this addendum, PRHFA is providing an estimated average number of labor hours to complete each case. See Exhibit A.

Question #19:

How will PRHFA measure compliance and service quality from the contractor?

Answer #19:

Assessing compliance with regulations and procedures and expected time per task. PRHFA's staff will measure the accuracy of submitted applications, specifically the proportions that are processed without needing to be returned to the Case Manager for correction.

Question #20:

Section 5.2 mentions "incidental or related endeavors". Can PRHFA clarify examples of these tasks and how they are to be billed?

Answer #20:

For example, represent or support PRHFA in any activity or event that may be required, such as service fairs or orientations to the public.

Question #21:

Will PRHFA provide or require a standardized task structure or workflow for each case (e.g., orientation, eligibility review, documentation, environmental checks, etc.) to guide both delivery and billing? (Note: in our experience for this type of contract, a predetermined structure of key tasks is defined, which is used for measurement compliance, invoicing, etc.)

Answer #21:

As part of this addendum, PRHFA is providing an estimated number of tasks and labor hours to complete each case. See Exhibit A.

Question #22:

Are contractors expected to provide services island-wide, or will municipalities or regions be assigned?

Answer #22:

Contractors must provide services all over the Puerto Rican Archipelago. However, in relation to the HOME Municipal Housing Rehabilitation Initiative, we expect to select approximately 20 municipalities that would benefit from this activity.

Question #23:

Will PRHFA establish reimbursement rates for mileage, tolls, or travel time, or must those be bundled into the hourly rate?

Answer #23:

All costs related to the provision of services should be included in the hourly rate.

Question #24:

Will PRHFA provide a case management system for contractors to input data and generate reports?

Answer #24:

PRHFA does not have a particular case management system for these services.

Question #25:

Is the contractor responsible for maintaining IDIS-related documentation, or will this be handled exclusively by PRHFA staff?

Answer #25:

It will be handled by PRHFA staff.

Question #26:

What level of reporting detail will be required (e.g., case-level notes, checklists, compliance audits)?

Answer #26:

Case-level notes and/or notes in weekly and monthly reports.

Question #27:

If a case manager completes substantial work on an applicant's file (e.g., document intake, eligibility screening, inspection coordination), but the applicant later withdraws or is found ineligible, will the contractor be compensated for the time worked? We respectfully request confirmation that payment will be made for completed efforts regardless of whether the applicant advances to closing or final disbursement, which are outside the contractor's control. (Note: in our experience for this type of contract, uses percentage of completion of key tasks for a specific case, and billing is structured by task completed)

Answer #27:

As part of this addendum, PRHFA is providing an estimated average number of tasks and labor hours to complete each case. See Exhibit A. Billing will be structured by task completed.

Question #28:

Will PRHFA issue a task order or internal Scope of Work upon execution to guide rollout and clarify priorities?

Answer #28:

Yes, the PRHFA will define or clarify priorities upon execution, as needed.

Question #29:

Is the case manager expected to support community outreach and intake efforts, or will PRHFA assign pre-screened beneficiaries?

Answer #29:

PRHFA will assign the pre-selected beneficiaries.

Question #30:

Will PRHFA provide case management SOPs or protocols, or is the selected contractor expected to design and implement these?

Answer #30:

PRHFA will provide the Case Manager with the procedures and requirements to evaluate the cases assigned.

Question #31:

In reference to the stated requirement for IDIS familiarity, would experience with comparable systems and a structured training plan (e.g., using HUD Exchange modules) be accepted as sufficient for compliance, or is prior hands-on IDIS experience mandatory at the time of submission?

Answer #31:

PRHFA will accept experience with comparable systems. No hands-on IDIS experience is required.

Question #32:

Will there be any third-party oversight or external auditing entity supervising the work of the selected Case Manager(s) during the contract period?

Answer #32:

PRHFA will be directly in charge of overseeing the work done by the Case Managers.

Question #33:

Can you please indicate the estimated or expected number of cases/projects that will be managed under this contract during the initial one-year term?

Answer #33:

The number of units and/or projects is not predetermined. This will depend on the applicants for the funds. However, we estimate to have the following requests: Single-Family: 85 families (Rehab by Owner – 75 + TBRA- 10).

Question #34:

Will PRHFA consider awarding contracts to more than one Case Manager as part of this procurement process?

Answer #34:

PRHFA reserves the right to award more than one Case Manager as part of this procurement process.

Question #35:

Aside from the published RFP, are there any additional documents, exhibits, appendices, or attachments (e.g., templates, budget forms, technical annexes, or related NOFAs) that interested respondents should review or include as part of their proposal?

Answer #35:

As part of this addendum, PRHFA is providing a standardized cost form as Exhibit B and an estimate of labor hours per task as Exhibit B. Regarding the municipal initiative, we encourage proponents to visit our web page: www.afv.pr.gov , click on “Avisos” tab and review the documents related to the Notice of Funding Availability – HOME Program- Municipal Housing Rehabilitation by Owner Initiative at <https://www.afv.pr.gov/wp-content/uploads/2025/04/home-rehab-nofa-municipios-v5-clean-rev-9-abr-2025-eti-rev-jt-4-9.docx>.

Also, you can watch a recording of the May 6, 2025 Spanish presentation on our YouTube channel: <https://www.youtube.com/watch?v=XraQQxvURd0>

Question #36:

To demonstrate financial soundness and capacity as required in Section 6.3.1(A) of the RFP, could you please clarify what specific documentation or evidence PRHFA expects respondents to submit?

Answer #36:

One of the best documents to be able to demonstrate the financial capacity would be the most recent audited financial statements of the entity (for 2024 and/or 2025).

Question #37:

Has PRHFA provided a specific cost proposal form or template that respondents must use for the budget section, or are we expected to format the cost breakdown at our discretion as long as it includes the required details?

Answer #37:

As part of this addendum, PRHFA is providing a standardized cost form as Exhibit B.

Question #38:

Are there any specific requirements or qualifications that key staff must meet (e.g., licenses, certifications, minimum years of experience) to be eligible under this RFP? Additionally, are there any roles that PRHFA expects to be mandatory as part of the proposed project team?

Answer #38:

No minimum requirement is established in the RFP. However, PRHFA reserves the right to hire staff who have the best qualifications to perform the tasks described. Please include in Exhibit B the proposed key staff. The PRHFA will evaluate the proposed key staff taking into consideration the proposed work plan, overall cost and overall approach to provide the Case Management Services.

Question #39:

Can PRHFA clarify the process and requirements for requesting approval to use subcontractors, including whether subcontractor qualifications must be submitted with the proposal?

Answer #39:

It is not required to be included in the proposal but can be included. The following documentation is recommended: Certification that neither the company nor its officers are suspended or debarred ("Suspension & Debarment") from doing business with the Federal Government, Certification that no conflict of interest exists should they be awarded the contract, Certification of compliance with the provisions of the Anti-Corruption Code for the New Puerto Rico (Act No. 2-2018, as amended), "Unique Entity ID" (UEI) and evidence of active registry in the System for Award Management (SAM) at www.sam.gov, Executive Order No. 14173 of January 21, 2025, "Ending Illegal Discrimination and Restoring Merit Based Opportunity". Requirements of the Section 6.3 Background and description of services and personnel-RFP.

Question #40:

Are there any standard conflict of interest or ethics disclosure forms that must be submitted with the proposal, or will those be required only upon award?

Answer #40:

There is no standard conflict of interest or ethics disclosure forms to be submitted with the proposal. PRHFA requires and expect potential contractor to disclose actual and/or potential conflicts of interest prior to award.

Question #41:

What is the estimated volume of cases expected to be managed during the contract period?

Answer #41:

The number of units and/or projects is not predetermined. This will depend on the applicants for the funds. However, we estimate to have the following requests: Single-Family: 85 families (Rehab by Owner – 75 + TBRA- 10).

Question #42:

Will there be a fixed regional assignment, or will municipalities be rotated based on need?

Answer #42:

In relation to the HOME Municipal Housing Rehabilitation Initiative, we expect to select approximately 20 municipalities that would benefit from this activity. The Case Manager must be prepared to provide services all over the Puerto Rican Archipelago. The distribution of the assignments will be based on need.

Question #43:

What digital systems will PRHFA use for case file management and official communications?

Answer #43:

Currently, the PRHFA do not have a case file management system for the HOME/HTF activities. Once the Case Manager has been selected, PRHFA will coordinate the more efficient way for case management and official communications.

Question #44:

Who will be responsible for covering transportation costs for home visits?

Answer #44:

All costs related to the provision of services should be included in the hourly rate.

Question #45:

What is the procedure for coordinating inspections, studies, and deliverables with the municipalities?

Answer #45:

Once the Case Manager has been selected, the processes related to inspections, studies, etc. will be coordinated with PRHFA. However, we encourage proponents to visit our web page: www.afv.pr.gov, click on "Avisos" tab and review the documents related to the Notice of Funding Availability – HOME Program-Municipal Housing Rehabilitation by Owner Initiative at <https://www.afv.pr.gov/wp-content/uploads/2025/04/home-rehab-nofa-municipios-v5-clean-rev-9-abr-2025-eti-rev-jt-4-9.docx>.

Also, you can watch a recording of the May 6, 2025 Spanish presentation on our YouTube channel: <https://www.youtube.com/watch?v=XraQOxvURd0>

Question #46:

Will there be any third-party oversight or external auditing entity supervising the work of the selected Case Manager during the contract period?

Answer #46:

PRHFA will be directly in charge of overseeing the work done by the Case Managers.

Question #47:

What is the average expected timeline for processing a case from application to final approval?

Answer #47:

As part of this addendum, PRHFA is providing an estimated average number of labor hours to complete each case. See Exhibit A.

Question #48:

What level of authority will the case manager have to recommend solutions in complex situations?

Answer #48:

The Case Manager will have direct access to PRHFA management through which he/she will be able to communicate and receive instructions to handle unusual cases with special characteristics.

-----END OF ADDENDUM #3-----

Exhibit A
Average Number of Labor Hours
REQUEST FOR PROPOSALS
CASE MANAGEMENT SERVICES FOR HOME & HTF PROGRAMS ACTIVITIES

Task	Frequency	Scope	Estimated Hours
01:Pre-Application Consultations	By Application	During this Task, Case Managers will provide general guidance and technical assistance to applicants related to HOME/HTF Program requirements. This task concludes when the applicant attests receiving the general guidance and technical assistance related to the application.	1
02: Pre-Application Review	By Application	In this Task, the Case Manager assists by collecting all the documents required to determine the eligibility of the candidates for HOME/HTF program. This task concludes once the Case Manager becomes ready to submit the candidate's application to the PRHFA's staff.	8
03:Submit Complete Application	By Application	Case Managers will assist applicants with the submission of the application, including any follow-up required to have each file submitted and reviewed for eligibility and underwriting, including assisting, acquiring and submitting documents needed for Award determination.	8
04:Award Coordination Assistance	By Application	Case Managers will be responsible for guiding the interested parties through the Award Coordination Process.	2
05: File Closeout	By Application	Case Managers will assist in the submissions of receipts or other proof of compliant spending on the awarded funds, LMI reporting, and other Closeout steps for HOME/HTF.	5

Estimate of Total Hours per Application: **24**

Notes on Average Number of Labor Hours:

- 1) The number of hours for each of the tasks does not represent the effort required for the applications. The purpose of the estimated hours and take serves as a basis for the Proposers to be able to calculate the total cost of their Proposal.

- 2) The Proposers could include, as part of the work plan or overall approach, a different estimate of labors hours applied to each task based on their experience providing similar services to the ones requested in this RFP to other GPR entities, municipalities or NPOs, in programs comparable to the HOME Program, such as, but not limited to: LIHTC; TBRA; Housing Choice Voucher Program Section 8; HTF; and/or SRO.

----- END OF EXHIBIT A FOR ADDENDUM #3-----

Exhibit B
COST FORM
REQUEST FOR PROPOSALS
CASE MANAGEMENT SERVICES FOR HOME & HTF PROGRAMS ACTIVITIES

Name of Proposer: _____

CASE MANAGEMENT

(MAXIMUM PER MONTH)¹

Position	Estimated Qty. of Resources (A)	Max. Hours Per Month Per Resource (B)	Rate Per Hour (C)	Estimated Monthly Cost Per Position (D = A x B x C)

Monthly Sub-Total: \$ _____

[1] Maximum Cost of Case Management Services for 1 Years (12 Months): \$ _____

Notes on Tasks: Case Management

- Estimated Qty. of Resources** represents the estimated quantity of personnel to be employed. Should not be interpreted as a cap on the allowed quantity of staff.
- Max. Hours Per Month Per Resource** represents the estimated quantity of monthly hours to be employed. Should not be interpreted as a cap on the allowed level of effort per position.
- Rate Per Hour** includes overhead, profit, royalties, reimbursements, travel, fringe benefits, taxes, as well as any other additional fees and administrative costs applicable to the services.
- Estimated Monthly Cost Per Position** represents the estimated cost of positions based on the Estimated Quantity of Resources and the Estimated Hours Per Month Per Resource in the cost form. Should not be interpreted as a cap on the allowed billing per position.

¹ Please add the proposed key staff to achieve the scope of work included in the Section 5 of the RFP. If the proposed key staff has more than three (3) positions, please customize the table accordingly.

5. **Monthly Sub-Total** represents the estimate amount that the Proposer considers invoicing for the proposed key staff at any given month.

TASKS (PER UNIT SERVICES)

Task	Qty. (A)	Unit Price (B)	Total Cost (C = A × B)
01: Pre-Application Consultations		\$	\$
02: Pre-Application Review		\$	\$
03: Submit Complete Application		\$	\$
04: Award Coordination Assistance		\$	\$
05: File Closeout		\$	\$

[1] Total Cost for each Application: \$ _____

Notes on Tasks 01 to 05:

1. **Qty.** represents the amount of tasks PRHFA expects for the entirety of the HOME & HTF Cases at the moment. Therefore, the actual amount of applications, and therefore units, to be included in the Proposer's contract and that the Proposer might be able to perform will depend on the final number of Proposers that might be awarded through the RFP. This does not limit PRHFA in amending the contract of any Proposer to include additional estimated quantities of applications based on performance metrics of the Proposers.
 2. **Unit Price** includes any and all costs associated to the performance of the different tasks. This includes personnel, benefits, reimbursable expenses, equipment, materials, rent, overhead, profit, and any other cost of performing the tasks, including all activities as depicted in the Scope of Services included in Section 5 of the RFP.
 3. **Total Cost** represents the estimated total cost for processing applications under HOME & HTF Programs.
-

TOTAL PROPOSAL COST:

\$ _____

Notes on Total Proposal Cost

1. The **Total Proposal Cost** represents the potential total cost for the services, if PRHFA determines to contract award a single Proposer for the Case Management Services.
 2. PRHFA reserves the right to award to one or more Proposers. Based on the number of Proposers finally awarded through this RFP, contracts might be signed for quantities of applications, and therefore per-unit tasks. This, however, does not limit PRHFA in amending contracts of awarded Proposers to include additional estimated quantities of applications based on performance metrics.
 3. PRHFA reserves the right to amend the contract to, but not limited to, include additional applications if additional funds are allocated to HOME & HTF Programs during the life of the contract (without amendments).
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Proposer's Authorized Representative Signature: _____

Proposer's Authorized Representative Printed Name: _____

Proposer's Authorized Representative Position: _____

Date: _____