



# **BREAKOUT 2**

# **OWNER & RELATED SERVICES**

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# OWNER & RELATED SERVICES

**BREAKOUT 1  
DEVELOPER &  
RELATED  
SERVICES**

Fenton Room - Upstairs

**BREAKOUT 2  
OWNER &  
RELATED  
SERVICES**

Spring Room - First Floor

**BREAKOUT 3  
GENERAL  
VENDOR  
SERVICES**

Great Room - First Floor

# HOC MISSION AND ROLE OF PROPERTY MANAGEMENT

**The mission of HOC** is to provide affordable housing and supportive housing services that enhance the lives of low- and moderate-income families and individuals throughout Montgomery County.

HOC's **Property Management Division** manages and maintains the agency's diverse portfolio of affordable and market rate, energy efficient residential communities. The Division is responsible for the following functions:

- **Property Management:** Oversees portfolio management, provides responsive customer service, establishes community partnerships, and maintains our properties to meet or exceed community standards.
- **Property Maintenance:** Completes timely work orders and maintains our properties in a manner that meets or exceeds community standards.
- **Asset Management:** implements operational and financing strategies for HOC-owned real estate and recommend actions based on those strategies.



# HOC OVERVIEW:

## *Summary Of Units Owned*

HOC is the county's largest provider of high-quality, amenity-rich, affordable housing for low- and moderate-income households.

- 9,416 - Units Owned by HOC in 89 Ownership Entities
- 1,855 - Units Managed by HOC
- 7,561 - Units Owned by HOC that are Contract Managed



# HOC OVERVIEW:

## *Summary By Property Types*

### **48 Multifamily Properties**

- 8 High-Rise Buildings
- 27 Mid-Rise / Garden Apartments
- 11 Townhome Communities
- 2 Single Family / Townhomes

### **12 Senior Multifamily Properties**

- 7 High-Rise Buildings
- 5 Mid-Rise / Garden Apartments

### **1,595 Scattered Site Units**

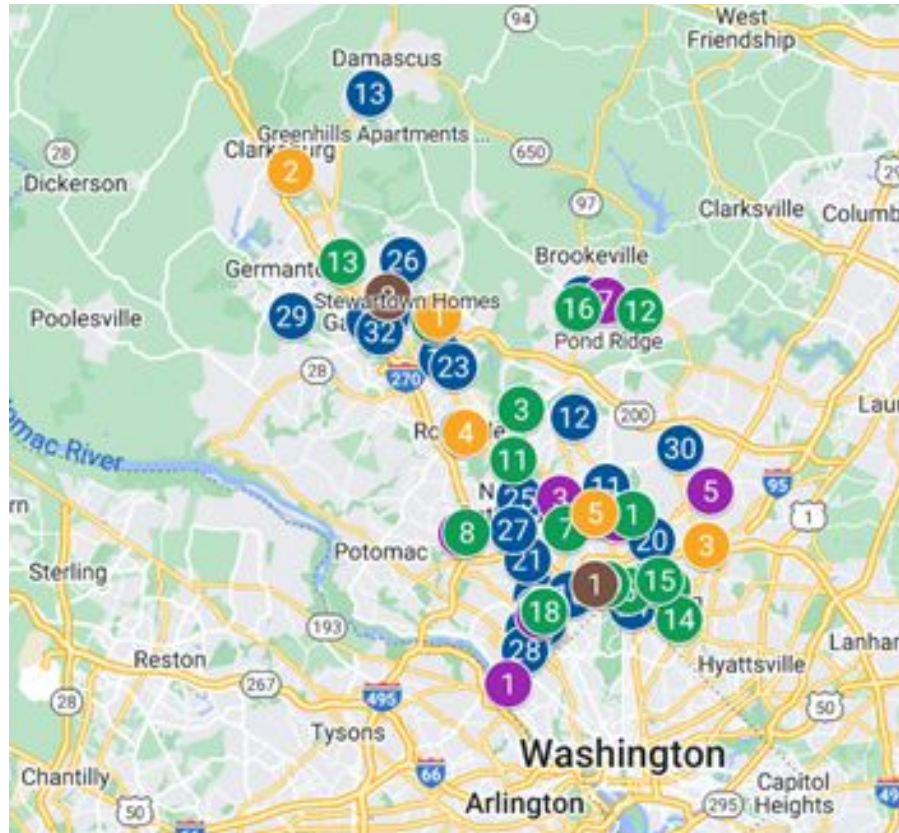
- 24 Ownership Entities
- 241 HOA Communities

#### **Scattered Site Unit Mix**

- 14 High-Rise Buildings
- 228 Mid-Rise / Garden Apartments
- 1,213 Townhomes
- 140 Single Family Homes

# HOC OVERVIEW:

## *Location Map*



HOC properties are located across over 500 square miles in Montgomery County from Takoma Park to Damascus and points east and west.

- Contract Managed Properties
- HOC Managed Properties
- Contract Managed with HOC Maintenance
- Redevelopment Properties
- Commercial / Non-Residential Properties



# SUMMARY PUBLIC PURPOSE AND SERVICES PROVIDED

- HOC provides rental housing options at different affordability levels to accommodate diverse economic needs. HOC's units range from deeply affordable to workforce and market rate levels, covering households with incomes at or below 30% of the Area Median Income and up.
- HOC is a national leader in developing mixed-income housing, a type of Opportunity Housing, which includes market-rate units and affordable units in the same development. HOC's Opportunity Housing units consist of mixed-income non-federally subsidized housing types. Units are located within multifamily developments or scattered sites and typically serve low-, moderate-income, and market rate customers.
- HOC provides housing using a range of Federal and State programs. Many of these properties are subject to HUD REAC inspections.

# SUMMARY PUBLIC PURPOSE AND SERVICES PROVIDED *(Cont.)*

The Resident Services Division provides services to HOC customers and other program participants through education, recreation, life skills and wellness programming.

- **Financial Literacy Services:** Helps individuals manage their finances and improve their credit score through group workshops and one-on-one coaching.
- **HOC Academy:** Education, training and enrichment services/programs for HOC customers.
  - **Youth Enrichment Services:** Focuses on STEM and STEAM programming for HOC youth
  - **Adult Education and Workforce Development:** Offers education, job training and job referral/placement opportunities
- **Fatherhood Initiative:** Program promotes the strengthening of fathers and their families by providing parenting education, case management services, financial assistance for educational classes and training, and participation incentives.

# MANAGEMENT STRATEGY

- HOC's approach to property management employs different strategies for its portfolio to optimize operating results
- HOC's Property Management staff oversees the performance of the properties by; monitoring compliance, fiscal, and physical performance of its assets
- HOC contracts the management of its multifamily portfolio to third-party management companies
- HOC self manages the scattered sites portfolio and several small multifamily properties



# TYPES OF PROPERTY PROCUREMENT

HOC and our Management partners procure a variety of goods and services for the operation and maintenance of properties.

- Annual contracts for routine maintenance and other property related services are typically sent out for bid via RFP and may have renewals
- Many services are procured as needed according to the HOC Procurement Policy depending on the cost for the goods or services either via formal procurement, three quotes, or one quote if reasonable



# RELATED SERVICES

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- Property Management Services
- General Contractors
- HVAC Contractors
- Fire Safety/Sprinklers
- Mold Remediation
- Unit Turnover
- Janitorial/Cleaning Services
- Inspection Services





# RELATED SERVICES *(Cont.)*

- Landscaping
- Snow Removal
- Laundry Services/Coin Laundry
- Uniform
- Elevator Maintenance
- Security Services
- Eviction Services
- Water Treatment and Drinking Water Services





# RELATED SERVICES *(Cont.)*

- Moving & Storage
- Refuse and Recycling Services
- Towing Services
- Uniforms
- Customer Satisfaction Surveys
- Compliance File Reviews
- Banking Services



# TYPES OF PROCUREMENTS

REQUIREMENT	MICROPURCHASE	SMALL PURCHASE	POOL*	IFB	RFP	RFQ
Minimum # of Quotes	1	3	3	N/A	N/A	N/A
Evaluation	Price needs to be reasonable based on a cost and price analysis.	Awarded to the vendor that is responsive, responsible and submits the lowest price. HOC can select the non-lowest price if the rationale is documented.	Awarded to a pre-qualified vendor that is responsive, responsible and submits the lowest price. HOC can select the non-lowest price if the rationale is documented.	Invitation to bid for a fixed price contract. Awarded to the vendor that is responsive, responsible and submits the lowest price.	Awarded to the vendor that scores the highest on the criteria set forth in the RFP as scored by an evaluation committee.	Request for qualifications. Award is primarily based on the vendor's qualifications to perform the work.
Commission Approval Needed	No	No	No*	Depends	Yes	Depends

\*Note: To be included in a procurement pool, vendors must be pre-qualified through an RFQ. which does require Commission Approval.

# PRIORITIES FOR PROCUREMENT:

## *Evaluation Criteria (Illustration)*

**Example:** Evaluation criteria for a Request for Proposal (RFP) for Property Management Services:

- Qualifications and Fees are the most important criteria for this RFP; therefore, the highest point value would be allocated to those two criteria
- Points are allocated for MFD participation to respond to HOC initiative on race, equity, and inclusion in procurement
- Generally, evaluation criteria for RFPs would reflect the services and experience level needed

Evaluation Criteria	Max Points
Qualifications & Capabilities	25
Current & Past Performance	20
Proposed Property Plan	15
Management Fee/Vendor Costs	25
Minority/Female/Disabled Participation	15
<b>Total Possible Points</b>	<b>100</b>



# PRIORITIES FOR PROCUREMENT:

## *Other Considerations*

- **Small Business:** Independently owned, not dominant in the field of operation, not an affiliate or subsidiary of a business dominant in the field of operation
- **Minority-owned Business:** At least 51% is owned by one or more minority group members or in the case of a publicly-owned business, one in which at least 51% of its voting stock is owned by one or more minority group members (Black, Hispanic, Native, Asian Pacific, Asian Indian, Hasidic Jewish Americans)
- **Women's Business Enterprise:** At least 51% is owned by a woman/women who are US citizens and who control the business
- **Section 3 Business Concern:** More than 51% is owned by Public Housing residents

# SAMPLE LIST OF UPCOMING PROCUREMENTS

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Property Management Services for various HOC properties<ul style="list-style-type: none"><li>• All HOC contract managed properties will be going out for RFP's for contracts that will be effective starting in July 2023</li><li>• Will be posted for quarterly contract start dates throughout the next 12 to 18 months</li></ul></li></ul> | <ul style="list-style-type: none"><li>• Moving, Packing, and Storage<ul style="list-style-type: none"><li>• Pool of contractors to provide relocation services for property renovations or other resident relocation needs</li></ul></li><li>• Plumbing System Repairs &amp; Servicing</li><li>• Mold Remediation</li><li>• Fire Alarm &amp; Sprinkler Servicing &amp; Repair</li></ul> |
| <ul style="list-style-type: none"><li>• Scattered Site Unit Renovations</li></ul>   | <ul style="list-style-type: none"><li>• Eviction Services</li></ul>   |

# Q & A | THANK YOU

## Procurement Office Contact:

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[www.hocmc.org/do-business-with-us.html](http://www.hocmc.org/do-business-with-us.html)