



Housing Authority  
of the  
City of Alameda

**PHONE:** (510) 747-4300  
**FAX:** (510) 522-7848  
**TTY/TRS:** 711

701 Atlantic Avenue • Alameda, California 94501-2161

# Third Party Property Management Request for Qualifications (RFQ)

Issued April 2, 2026

- **RFQ**
  - **About Alameda Housing Authority (AHA)**
  - **About the AHA Portfolio**
  - **RFQ Response/Proposal Submission Requirements**
  
- Appendix A – Minimum Qualifications & Scope of Work
- Appendix B - Portfolio Overview
- Appendix C – Anticipated Review & Selection Schedule
- Appendix D - Permanent Supportive Housing Qualifications and Requirements
- Appendix E – Insurance requirements

## Key Dates

**Pre-Bid Conference (remote)**  
**April 15, 2026 at 1PM PST**

<https://v.ringcentral.com/join/898746049?pw=d3406906c680b1d9e04efdbbeb6d3342>

**Deadline to submit questions**  
**April 20, 2026 at 5PM PST**

**RFQ Responses Due**  
**April 24, 2026 at 5PM PST**

**The Housing Authority of the City of Alameda  
Property Management Request for Qualifications  
April 2, 2026**

The Housing Authority of the City of Alameda (AHA) is inviting property management agents with affordable housing experience to submit a response to this request for qualifications (RFQ) to manage AHA's multifamily portfolio, with an anticipated contract start date of September 1, 2026. The RFQ covers all AHA owned and affiliated properties with additional proposed and in-development properties to be added in coming years. AHA expects to sign a contract for a 3-year period with two one-year renewal options.

The Proposal and Selection Process

This RFQ provides information that your company will need to submit as a response to the RFQ. This is the first round of a two-step solicitation and is designed for management agent response with minimal additional information. The second round of the selection process will include interviews, fee proposals, performance expectations and AHA's expected PMA terms.

AHA will select one or more management agents with the capacity to provide a full range of property management services including day-to-day operations, staffing, program compliance, financial management, reporting, maintenance, as well as lease-up of new properties.

**Note:** While AHA's preference is for a full-service affordable property management provider, AHA also welcomes responses from companies that do only one or two of the key parts of the property management cycle. This might be, for example, companies who only provide financial accounting for property management, or a market rate property management company who does not do affordable compliance part. Any bidder who does not provide all the services listed in Appendix A should indicate that clearly in their response. Additionally, if you bid as a company that only does accounting for property management but joint venture with a property management company for day-to-day operations as an example, please note this in your response and provide information on how this has been effective.

More detail on AHA's minimum qualifications and scope of work is attached as Appendix A.

**About AHA & The Property Portfolio**

The Housing Authority of the City of Alameda (AHA) advocates for and provides quality, affordable, safe housing; encourages self-sufficiency; and builds community partnerships. AHA is a public agency headed by an Executive Director (ED) and governed by a seven-person Board of Commissioners. AHA owns residential property directly as well as through its affiliates, Alameda Affordable Housing Corporation (AAHC), Island City Development (ICD) and low-income housing tax credit partnerships. Unless otherwise stated, all AHA-affiliated residential apartment units listed below are eligible for this solicitation.

Despite its designation as a public housing authority, AHA owns *no* Public Housing units, operating less like a traditional public housing authority and more like a medium-to-large nonprofit housing developer and owner, with approximately 50 employees.

AHA and its affiliates currently own or control 23 properties consisting of 796 units of affordable housing (one of which includes 3 commercial spaces) with two additional properties totaling another 106 apartments in development. The AHA portfolio consists of family and senior communities, scattered site housing, and permanent supportive housing for formerly homeless residents. The entire portfolio is located on the island of Alameda, California. A detailed list of AHA's property portfolio is included in Appendix B.

All properties are affordable to residents with incomes at or below 80% of area median income (AMI). Some units have significantly lower AMIs but most AHA residents have Project Based or Tenant Based vouchers. The properties are supported with funding from a range of sources, including Low Income Housing Tax Credits (LIHTC), State of CA Multifamily Housing Program (MHP), AHA, Alameda City and County funding, Project Based Voucher rent subsidy, soft and conventional loans and other affordable and homeless housing funding sources.

### **How Many Properties Can We Bid On?**

Responders may make a proposal for the number and type of properties that they feel capable of managing competently. AHA would prefer to contract with fewer management companies unless there is a compelling reason to assign several smaller management contracts. AHA requests that management companies bid for a minimum of 252 units. The entire LIHTC portfolio of five properties containing 252 units may be better to be managed by one property management company but this is not required.

### **Key Dates**

- **Bid Conference**: AHA will hold an online "pre-proposal" conference on April 15, 2026 at 1PM. Participation at the bid conference is optional, but it will be the best time to ask questions before the RFQ response due date. AHA will arrange inspections of property common areas later in the process.

The link for the conference is:

<https://v.ringcentral.com/join/898746049?pw=d3406906c680b1d9e04efdbeeb6d3342>

- **Proposal/RFQ Response Due Date**: Response requirements to the RFQ are listed on the following page, and are due to AHA no later than 5:00 PM (PST) on April 24, 2026. The RFQ response should be sent by email (preferably one PDF file) to AHA's property management consultant, Jack Geary, at [jack.geary@outlook.com](mailto:jack.geary@outlook.com) with a copy to Nancy Gerardin (AHA's Director of Property Operations) at [ngeradin@alamedahsg.org](mailto:ngeradin@alamedahsg.org). See detailed RFQ response requirements on the following page. We will confirm receipt of your proposal within 24 hours of receipt. More information can be found here: <https://www.alamedahsg.org/contracting-with-aha>

Proposals can also be submitted via Bonfire (Euna) – <https://alamedahsg.bonfirehub.com/portal/?tab=openOpportunities>

- **Schedule:** An anticipated Summary Schedule for this review and selection is included in this RFQ as Appendix C.

### **RFQ Response/Proposal**

Again, please include the following information in your RFQ response/proposal. digitally (a single PDF file is preferred) to Jack Geary, Consultant, at [jack.geary@outlook.com](mailto:jack.geary@outlook.com) and cc-ed to Nancy Gerardin at [ngeradin@alamedahsg.org](mailto:ngeradin@alamedahsg.org) no later than April 24, 2026 at 5:00 PM (PST) : On company letterhead, provide a **brief letter of interest** in this contract opportunity, including a statement that the firm is not prohibited from managing property financed or assisted by HUD, the State of California, tax credits or other key funders, and signed by an authorized signer. Your response should not include a management fee proposal – this will be requested later along with other information if needed.

Any bidder who does not provide all the services listed in Appendix A should indicate that clearly in their response and mark the below as N/A if not applicable.

1. Provide a **statement summarizing the experience and capacity** of the firm, particularly in the management of not-for-profit controlled affordable housing located in California, including HUD subsidized, low-income housing tax credit (LIHTC), State of CA sources, and Permanent Supportive Housing. Management firms do not need to prepare a statement of experience specifically for this proposal. Previously prepared promotional material about the firm is sufficient if it tells your story and which will provide AHA with a summary of your qualifications for this contract. Current LIHTC experience exhibits are helpful. Please also review the minimum qualifications in Appendix A and ensure that you meet the criteria.
2. Provide a **listing of properties currently under management in California**, including name and location (city or town) of property, number of units, year built/date of renovation and tenant type (senior, family, veteran, supportive) property funding/restriction type (HUD, LIHTC, etc.). (See Appendix A).
3. Provide at least **3 references** in the State of California that we may contact in the second round.
4. Provide a **prototype set of monthly operating reports** routinely provided to owners. At a minimum, please include a prototype Budget Variance Report, Balance Sheet, Rent Roll,

Vacancy/Leasing Pipeline and Aged Accounts Receivable Report. Prospective bidders do not need to create something new for this proposal. If you submit reports prepared for another client, please redact all sensitive, confidential or personally identifiable information of residents/applicants (e.g. names, Social Security numbers, etc.).

5. Please state **all the accounting and business management software system(s)** your company would utilize for this contract (e.g. accounting, compliance, leases, document storage, background checks and collections reporting). If you are not using Yardi for all functions, please state what systems are used for which function. Also please state if you are willing to switch to Yardi or to operate within AHA's Yardi database.
6. Provide **resumes or bios of the 3-4 primary contact/s** (Regional Manager, VP, CFO, broker, relationship manager for portfolio etc.) for AHA portfolio. (Write this as if the contract were to be assigned today - we recognize that this is based on the best information available at this time and could change).
7. Provide a **brief description of other key subject matter experts** within the firm available to provide support to AHA. This might include the firm's experts in areas such as LIHTC and program compliance, financial management, marketing, maintenance and capital planning and refinancing/syndication.
8. Provide the **broker's name and license number**. If you also have a corporate broker number, please include that as well. All proposers must meet California DRE requirements for third party fee management of properties. Describe how the broker exercises control over the site staff to ensure compliance.
9. Provide a **company ownership and organizational chart**. Proposers should indicate clearly if certain services (e.g. bookkeeping, compliance, HR) are currently carried out (or will be carried out) by a third party and include the name and location of the third party and an explanation of how those services are managed.
10. Submit a sample **Property Management Agreement**. There is no need to create a new one. You may submit one for a similar property you already manage.
11. Indicate whether you are applying to **manage all or part of the portfolio** and if partial, please indicate which properties.
12. Proposers may **partner with or subcontract specific tasks** or management functions with AHAs written approval. Any such partnership or subcontracting must clearly indicate the specific services or functions and provide the name and location of the partner or

subcontractor. Any approved partner or subcontractor would be bound by the terms of the contract, including all insurance terms, conditions requirements with the proposer retaining responsibility for full contract compliance and liability for any breach of contract.

13. If applying to manage the **Permanent Supportive Housing** units, please provide a brief description of your qualifications and experience to include the name, location, property size, and years of management of similar properties,. Please see Appendix D.
14. Confirm your ability to meet the **insurance requirements** in Appendix E. If not please Indicate any questions or concerns you may have with the insurance requirements.

### **Questions**

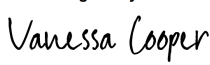
To preserve the integrity of the review and selection process, we are seeking to limit informal communications and questions between AHA staff, consultants, and management agents. The Pre-bid conference is a good opportunity to answer most questions.

Questions that arise before and following the conference should be directed in writing/email to AHA's property management consultant, Jack Geary at [jack.geary@outlook.com](mailto:jack.geary@outlook.com) with a copy to Nancy Gerardin at [ngeradin@alamedahsg.org](mailto:ngeradin@alamedahsg.org). Jack or Nancy may also reach out directly to bidders for additional information or about changes in the RFQ process such as timing if necessary. Please submit questions via email no later than 5pm on April 20, 2026. AHA will ensure that any questions and answers to those questions will be provided to all potential proposers no later than 5pm on April 22, 2026.

You may also submit the application by creating an account in Bonfire (Euna) using the portal to our procurement link here. <https://alamedahsg.bonfirehub.com/portal/?tab=openOpportunities>

Additional information can be found here on AHA's website.  
[Contracting with AHA - Housing Authority of the City of Alameda](https://www.alamedahsg.org/contracting-with-aha)  
<https://www.alamedahsg.org/contracting-with-aha>

Thank you for your interest in the AHA and in working together.

DocuSigned by:  
  
5AFA57239EC2484...

Vanessa Cooper  
Executive Director  
Alameda Housing Authority

## Appendix A

### **MINIMUM QUALIFICATIONS AND SCOPE OF MANAGEMENT SERVICES**

#### Minimum Requirements to Provide These Services:

1. Proposer must have at least five (5) years of experience providing property management services and must currently manage at least 300 units of housing financed with Federal, State, and local funding including LIHTC. Must have expertise directly or through a subcontractor in income certifications and reporting requirements for such programs and possess experience in processing Tenant or Project-Based Vouchers program.
2. Proposer must have at least three (3) separate client references where proposer has performed the same or similar professional services in the state of California to those proposed in this solicitation.
3. Proposer must be a licensed real estate broker, authorized to perform property management services in the State of California and proposing firm must be in good standing.
4. The proposed onsite staff and regional manager for Properties are expected to have at least two (2) years of experience providing property management services, preferably for affordable housing development. Staff who lease units must pass LIHTC training within 6 months of hire/start of contract date. AHA will pay once for online training for this.
5. Proposer must demonstrate adequate supervision and quality control mechanism to supervise properties and staff.
6. Proposer must have adequate home office administrative staff including adequate accounting and compliance functions. *Any outsourced functions must be disclosed and approved by owner.*
7. Proposer must utilize an electronic record keeping system/property management software. AHA prefers Yardi or management agents who are willing to move to Yardi for these sites.

## SCOPE OF SERVICES

Services to be requested include, but are not limited to:

- Operate and lease the Property in accordance with the Owner-approved Management Plan, and applicable regulatory agreements in compliance with fair housing laws. Meet all compliance requirements.
- Provide customary property management services required for the ordinary and usual business and affairs of the properties in a professional manner consistent with the management, operation, leasing, reporting and maintenance of similar properties in California.
- Manage the day-to-day operations of properties such as, but not limited to, proactive advertising and leasing of available units, prompt turning and re-occupancy of units, timely collection of rents and fees owed, scheduling and conducting timely and accurate household recertifications, completing the welfare tax exemption reports, LIHTC, lender and regulator reporting and submittal, accurate financial reporting, budget preparation, physical asset management to include routine and preventive maintenance and curb appeal and tenant relations.
- Plan and conduct timely preventive maintenance, annual unit inspections, capital planning for small scale items (under \$50,000).
- Manage relationships with vendors including proper procurement, supervision, insurance, permits and licenses and ensure timely payment.
- Pay and document prevailing wages for repair and maintenance work, as applicable. Complete capital improvement projects of less than \$50,000. Coordinate with owner's construction team for large projects.
- Provide prompt after-hour maintenance and emergency response. Ensure emergency planning and training for onsite staff.
- Notify AHA of any incidents of property damage, personal injury, or other losses or potential losses as soon as practicable after discovery of an incident, but no later than 2 business days for any water or fire damage or 5 days for other non-emergency damages.
- Plan and ensure program compliance for new move ins and existing residents. Conduct annual income certification on time in accordance with LIHTC and/or other funding regulations for every unit, even where no LIHTC funds are in place. Complete regulatory reporting including welfare tax exemptions in a timely manner.
- Ensure excellent record keeping onsite and offsite, preferably utilizing Yardi for all records (application management, leasing, background checks, accounting, vacancy management).
- Ensure regular onsite auditing by regional manager of property and files. Participate in property audit preparation, including a minimum 3rd party tenant file audit every year of all new move-ins and 10% of current residents on projects in operation.

- Meet owner and investor requirements for budget preparation, including rent increases, capital budget recommendations, and monthly tracking of financial activity (actuals vs budget vs proforma)
- Attend weekly video meetings with Owner for leasing, legal and operations matters. Other meetings may be required for PBV leasing, new building lease up, etc.
- Ensure timely enforcement of the lease with prompt and accurate issuance of notice and lease violations to residents. Tracking and timely follow-up of lease violations and termination notices. Coordinate with assigned counsel to ensure accurate and timely filing of unlawful detainers and attend court appearances and lockouts.
- Initiate legal collection action or rent eviction for tenants with balances in excess of \$500 with collections, providing monthly reporting of past due balance collection efforts. Provide write-off requests to AHA for approval quarterly and perform the write-off within two weeks of receipt of AHA approval.
- Provide formal responses to outside parties such as lenders, investors, Civil Rights Division and other regulatory agencies. Notify AHA of any requests for funder or regulatory partner inspection or visit and prepare for/conduct the inspections or inspection or file review visits.
- Complete accurate and timely reporting to Owner, investors, lenders, tax assessor and regulatory agencies.
- Coordinate with service providers, including LifeSTEPS. Projects with permanent supportive housing units will require weekly meetings with all providers on site, as well as a monthly management meeting with Owner.
- Property Manager must agree to interview specific existing management staff identified by the Owner who are currently employed at specific properties within the portfolio and consider retaining staff, pending allowable screening of employees.
- Property Manager is expected to manage the habitability of apartments, common areas and systems to ensure full compliance with Housing Quality Standards (HQS) and/or NSPIRE, within the required federal timelines and other inspections as necessary. All units are inspected every year by a third party but are expected to be inspected by the management agent annually as well as part of the preventative maintenance program.

**ADDITIONAL SERVICES AS NEEDED** (A separate fee will be paid for this when appropriate.)

- Property manager must be willing to provide consulting services on new construction projects, including early general review, comments and feedback on construction designs, mechanical systems, finishes, etc., for projects in design and development.
- Application support: For pipeline projects, services should be available to support AHA with marketing, applications, lease up and operating budget estimates. The Property Manager will need to be able to provide organizational experience documentation to meet LIHTC and State of CA funding program requirements at the highest point levels, a signed 1-year term contract (for application purposes only) and draft management and marketing plans as required.

- Lease up: For pipeline projects, a separate lease up addendum with specific goals and incentives is required and will be negotiated as new projects come up.

## **COORDINATION WITH RESIDENT SERVICES**

AHA offers and provides a vast array of services to the residents in our affordable housing communities and beyond. At AHA, we recognize the importance of reaching beyond the bricks and mortar of the properties we manage by going straight to the heart of the communities we serve: our residents. To effectively manage, we must reach and meet people where they are.

LifeSTEPS manages social service programs and activities at AHA properties, as well as providing one-on-one resident assistance with social service-related needs. The shared goal of AHA and LifeSTEPS is to provide quality community life through effective and supportive services that ensure attentiveness to the wellness, safety, and dignity of our residents. Proposers should have experience working with social services providers and with diverse communities and will be expected to work closely with social service providers.

In addition, because of the very high number of Housing Choice and Project Based Vouchers in these properties, proposers should expect a high level of coordination with the Housing Authority staff.

Appendix B  
AHA Portfolio Overview

Visit [www.alamedahsg.org](http://www.alamedahsg.org) for more information

**LARGER PROPERTIES** (see [www.AlamedaHsg.org](http://www.AlamedaHsg.org) for factsheets on each site)

Project Name	Address	# units	Ownership	Financing	Target population	PBV	Mgr. Unit
Anne B Diamant Plaza	920 Park Street	65	Alameda Affordable Housing Corp.	AHA	Seniors	59	Y
China Clipper Plaza	460 Buena Vista Avenue	26	Alameda Affordable Housing Corp.	AHA/ HOME	Family	6	Y
Eagle Village	721 Eagle Avenue	36	Alameda Affordable Housing Corp.	Conventional/ AHA	Family	0	Y
Esperanza	1903 Third Street	123	Alameda Affordable Housing Corp.	Conventional/ AHA	Family (includes 3 commercial spaces)	37	Y
Estuary One	500 Mosely	45	Island City Development	LIHTC/ HOME/	PSH	40	Y
Everett Commons	2437 Eagle Avenue	20	Island City Development	LIHTC/ conventional/ County/ HOME	Family/ VASH	12+5	Y
Independence Plaza	703 Atlantic Avenue	186	Alameda Housing Authority	Conventional/ AHA/ City	Seniors	145	Y
Linnet Corner	2000 Lakehurst Circle	64	Island City Development	LIHTC/ conventional/ HOME/ bond	PSH and seniors	40	Y
Littlejohn Commons	1301 Buena Vista Avenue	31	Island City Development	LIHTC/ Conventional/ HOME	Senior	25	Y
Parrot Gardens	1845 Bay Street	7	Alameda Housing Authority	n/a	Family	0	N
Parrot Village	1850 Wood Street	50	Alameda Affordable Housing Corp.	Conventional/ AHA	Family	36	Y
Rosefield Village	727 Buena Vista Avenue	92	Island City Development	LIHTC/ conventional/ HOME/ bond	Family	23	Y
<b>TOTAL</b>		<b>745</b>					

**SCATTERED SITES** (see [www.AlamedaHsg.org](http://www.AlamedaHsg.org) for factsheets on each site)

Project Name	Address	# units	Ownership	Financing	Target P	PBV	Mgr. Unit
Lincoln House*	745 Lincoln Avenue	4	Alameda Affordable Housing Corp.	County/ HOME	Family	0	N
Lincoln Willow**	2101 Lincoln Avenue	5	Alameda Affordable Housing Corp.	AHA	Family	3	N
Sherman House*	1416 Sherman Street	10	Alameda Affordable Housing Corp.	County/ HOME	Family	0	N
Stanford House**	1917 Stanford Street	4	Alameda Affordable Housing Corp.	AHA	Family	4	N
Paru House*	Paru Street	1	Alameda Affordable Housing Corp	n/a	Family	0	N
Tucker House*	Tucker House	1	Alameda Affordable Housing Corp	n/a	Family	0	N
Mulberry Condos*	Various - available on request	4	Alameda Affordable Housing Corp	n/a	Family	0	N
Family Condos*	Various - available on request	7	Alameda Affordable Housing Corp	HOME	Family	0	N
Pulte Condos**	Various - available upon request	18	Alameda Affordable Housing Corp	AHA	Family	0	N
<b>TOTAL</b>		<b>54</b>					

Note: Groupings for financial reporting may change for Scattered Site properties.

\*Owned by Alameda Housing Authority – Lincoln House and Sherman House must have separate financial statements for County of Alameda Reporting.

\*\*Owned by Alameda Affordable Housing Corporation

### FUTURE DEVELOPMENTS

Project Name	Address	# units	Ownership	Financing	Target population	PBV	Mgr. Unit	Estimated lease up or start date
Estuary Two	Mosley Avenue	46	Island City Development	4% LIHTC/ HCD/ bond	100% PSH	40	N*	2027
The Poplar	2615 Eagle Avenue	60	Island City Development	9% LIHTC/ HOME	Family	TBD	Y	2028
<b>TOTAL</b>		<b>106</b>						

## Appendix C

### **ANTICIPATED REVIEW & SELECTION SCHEDULE**

**SUBJECT TO CHANGE**

RFQ issued	Thursday, April 2, 2026
Remote Pre-Bid Conference	Wednesday, April 15, 2026 at 1pm PST
Deadline for questions	Monday, April 20, 2026 at 5pm PST
RFQ Response Due to AHA	Friday, April 24, 2026 at 5pm PST
Selection of Finalists approx. And notification of lenders and investors of finalist names. Requests for fee proposal and circulation of draft contract.	Week of April 27, 2026
Any Proposed Contract Changes due from Finalists	Week of May 4
Interview Finalists. Discuss any revised Fee Proposal & Any Proposed Contract Changes from Finalists if needed. Final Review & Meetings, References	Weeks of May 11 and 18
Select Management Agent	<b>Latest date:</b> Monday, June 1, 2026
Board approval expected- selected agent is expected to attend	Wednesday, June 17, 2026 at 7pm
Transition Period and lender/investor approval process (if new management agent selected)	June – Sept
Projected Contract Date	July 1, 2026
Estimated start date for management contract for all sites	No later than September 1, 2026

Appendix D

**PERMANENT SUPPORTIVE HOUSING QUALIFICATIONS**

## **SUPPORTIVE HOUSING MANAGEMENT EXPERIENCE REQUIREMENTS**

AHA expects to select a single proposer experienced with permanent supportive housing to manage the PSH properties listed below:

- Estuary I (45 Units - 100% PSH)
- Linnet Corner (64 Units - 25% PSH)
- 

Estuary II (46 Units - 100% PSH – Anticipated Placed in Service Date 2027)

Proposers may express interest in managing both permanent supportive housing and other AHA properties, however, permanent supportive housing experience is required. Proposers should indicate if they are interested in managing the PSH portfolio below as part of a broader bid including other properties or whether their bid is only for the PSH portfolio listed here.

### **The Proposer Should Provide the Following Information in This Section:**

- 1) A description of the proposer’s overall property management experience with supportive housing (serving special needs, elderly, people struggling with homelessness, individuals struggling with mental illness, or other target populations).

---

- 2) TCAC Maximum experience points: The TCAC Attachment 22 – Management Company Experience (<https://www.treasurer.ca.gov/ctcac/2026/applications/index.asp>) is sufficient showing 11 or more projects managed more than 3 years, including 2 California LIHTC projects. See CTCAC Regulations 10325 (c)(1)(B). Please explain in detail if the proposer is using on the alternate forms of demonstrating full TCAC points described in this Section.

---

- 3) HCD Maximum Supportive Housing Management Experience points: Demonstrate fulfillment of minimum experience requirements per 2021 MHP Guidelines Section 7302 Article 2 (A) (e) (5) (C) and (f) (1) (2) (p. 6-7)

---

- 4) Two supportive housing provider references from projects using Housing First principles of at least 10 units, one of which can provide a reference on first-time lease up activities. One reference from a public agency regarding a supportive housing project of at least 10 units.

---

- 5) Proposer to include a sample Housing First tenant selection plan and management plan.

---

- 6) Proposer should provide a list of other MHP, NPLH, VHHP, McKinney Vento SHP, Homekey, Roomkey, or other supportive housing projects using Housing First, utilizing the format on the next page:

**Supportive Housing Project List:**

Project Name and Address	Owner	Service Provider (s)	# of units	# of SH units	Housing Type: SN, Senior, Family, etc.	# of months serving	Housing First?	Funding source requiring Housing First (e.g. NPLH, 9%, SHP)	Were units occupied by people experiencing Homelessness, with on-site Comprehensive Case Management Services?
							Y / N		Y / N
							Y / N		Y / N
							Y / N		Y / N
							Y / N		Y / N
							Y / N		Y / N
							Y / N		Y / N
							Y / N		Y / N

Appendix E:

**INSURANCE REQUIREMENTS**

**Please indicate in your response if you can meet these requirements and if not please highlight any concerns or questions.**

Property Manager shall procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement and the results of that work by the Property Manager, its agents, representatives, employees, or subcontractors.

At all times, Property Manager shall maintain, at its own expense, the following in full force and effect:

**MINIMUM SCOPE AND LIMIT OF INSURANCE**

Coverage shall be at least as broad as:

1. **Commercial General Liability (CGL)** including products and completed operations, property damage, bodily injury, and personal and advertising injury with minimum limits of Two Million Dollars (\$2,000,000) per occurrence and Four Million Dollars (\$4,000,000) in the aggregate at least as broad as Insurance Services Office (ISO) Form CG 00 01. The CGL coverage shall be written on an occurrence basis and shall include a per-location or per-project aggregate endorsement (ISO CG 25 03 or 25 04) applicable to the Project, such that claims not arising from or in connection with Property Manager's performance of the work and obligations in this Agreement, do not erode the aggregate limits available to the Project. CGL coverage shall not exclude assault and battery or sexual abuse/molestation liability, unless Property Manager maintains a separate policy, or policies, with such coverages and with minimum limits of at least \$1,000,000 per occurrence and \$2,000,000 in the aggregate.
2. **Umbrella or Excess liability** with a minimum per occurrence limit of \$5,000,000 for structures with 1-10 stories. The umbrella/excess policy shall afford coverage at least as broad as the CGL policy requirements in this Agreement.

3. **Professional Liability (Errors and Omissions)** Insurance appropriate to the Property Manager's profession, with limit no less than \$2,000,000 per occurrence or claim, \$2,000,000 in the aggregate. If coverage is provided on a claims-made basis, the retroactive date must be shown and must be before the date of the Agreement or the beginning of the Agreement work. Insurance must be maintained, and evidence of coverage must be provided, for at least five (5) years after completion of the Agreement or work. If coverage is cancelled or non-renewed and not replaced with another claims-made policy form with a retroactive date prior to the Agreement effective date, the Property Manager must purchase "extended reporting" coverage for a minimum of five (5) years after the completion of work.
4. **Tenant Discrimination liability** including coverage for discrimination, harassment, and fair housing claims, including claims under the California Civils Rights Department (CRD) and HUD, which shall be covered in Property Manager's Professional Liability/Errors and Omissions (E&O) policy, an Employment Practices Liability Insurance (EPLI) policy that includes third-party EPLI coverage that covers tenant discrimination, or in a separately maintained Tenant Discrimination insurance policy, with minimum limits of \$1,000,000 per occurrence and \$2,000,000 in the aggregate.
5. **An Employee Dishonesty Fidelity Bond** in an amount equal to \$4,000,000, or a Commercial Crime Insurance policy, including coverage for employee dishonesty, forgery or alteration, and theft, disappearance, and destruction with an aggregate limit of \$4,000,000, or with no aggregate limit and a per-occurrence limit of at least \$1,000,000, to protect Owner against misapplication or loss of Project funds or other financial damages by Property Manager and/or its employees. Owner shall be named as a loss payee and/or additional insured.
6. **Automotive Liability** at least as broad as ISO Form Number CA 00 01 coverage any auto (Code 1), hired autos (Code 8), and non-owned autos (Code 9) with minimum limits of One Million Dollars (\$1,000,000) combined single limits per occurrence for bodily injury and property damage and physical damage (collision and comprehensive) liability.
7. **Workers' Compensation** and other employee benefits required by all applicable laws with respect to Property Manager's corporate employees with a limit not less than One Million Dollars (\$1,000,000) per accident for bodily injury or disease.
8. **Employment Practices Liability Insurance (EPLI)** covering claims and suits by or on behalf of employees and others not otherwise covered by statutory workers' compensation insurance.
9. **Cyber liability insurance** With coverage sufficiently broad to respond to the duties and obligations as is undertaken by Property Manager in this agreement and shall include, but not be limited to, claims involving security breach, system failure, data recovery, business

interruption, cyber extortion, social engineering, infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, and alteration of electronic information. The policy shall provide coverage for breach response costs, regulatory fines, and penalties as well as credit monitoring expenses with limits not less than \$2,000,000 per occurrence or claim, \$2,000,000 aggregate.

If Property Manager maintains broader coverage and/or higher limits than the minimums shown above, Owner requires and shall be entitled to the broader coverage and/or the higher limits maintained by the Property Manager. The insurance limits required by Owner are not represented as being sufficient to protect Property Manager. Property Manager is advised to consult Property Manager's insurance broker(s) to determine adequate coverage for Property Manager.

#### **OTHER INSURANCE REQUIREMENTS:**

The insurance policies are to contain, or be endorsed to contain, the following provisions:

- **Additional Insured Status:**

- The Housing Authority of the City of Alameda and its legal affiliates, Alameda Affordable Housing Corporation and Island City Development and its Subsidiaries and legal affiliates, and their departments, their respective directors, officers, Boards of Commissioners, employees, designated volunteers, elected or appointed officials, (collectively Additional Insureds), are to be covered as additional insured on Property Manager's CGL policy, Tenant Discrimination (or acceptable alternate) policy and, if applicable, the Cyber Liability policy and Commercial Crime Insurance policy, with respect to liability arising out of work or operations performed by or on behalf of Property Manager including materials, parts, or equipment furnished in connection with such work or operations.
- General liability coverage can be provided in the form of an endorsement to the Property Manager's insurance and shall be at least as broad as ISO Form CG 20 10 11 85. If CG 20 10 11 85 is not available, endorsement must be at least as broad as the addition of both CG 20 10 and CG 20 37; or CG 20 38 and CG 20 40.

- **Primary Coverage:**

- For any claims related to this contract, the Property Manager's insurance coverage shall be primary and non-contributory with coverage at least as broad as ISO CG 20 01 04 13 as respects Additional Insureds.
- Any insurance or self-insurance maintained by Additional Insureds shall be excess of Property Manager's insurance and shall not contribute to it.

- **Waiver of Subrogation:**

- Property Manager hereby grants to Owner a waiver of any right to subrogation which any insurer of said Property Manager may acquire against Owner by virtue of the payment of any loss under such insurance. Property Manager agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether Owner has received a waiver of subrogation endorsement from the Insurer.

- **Failure to Secure:**

- If Property Manager, at any time during the term hereof, should fail to secure or maintain the foregoing insurance, Owner shall be permitted to immediately terminate this Agreement.

- **Notice of Cancellation:** Each insurance policy required above shall provide that coverage shall not be canceled, except with 30 days' notice to Owner.

- **Acceptability of Insurers:** Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to Owner.

- **Verification of Coverage:**

- Property Manager shall furnish Owner with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by the insurance requirements in this Agreement, and a copy of the Declarations and Endorsements page of the CGL policy listing all policy endorsements before work begins.
- Property Manager shall furnish Owner with a complete copy of any Excess/Umbrella policies, with all endorsements, maintained by Property Manager before work begins.
- Property Manager shall furnish Owner with a complete copy of any policies effecting coverage for tenant discrimination, commercial crime insurance, employee dishonesty, and cyber liability maintained by Property Manager before work begins.
- Failure to obtain the required documents prior to the work beginning shall not waive the Property Manager's obligation to provide them.
- Owner reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

- **Subcontractors:** Property Manager shall pass down the insurance obligations contained herein to all tiers of subcontractors working under the Agreement.

- **Deductibles:** Deductibles applicable to Property Manager's policies required by this Agreement shall not be in excess of \$25,000, unless otherwise approved by Owner.
- **Notification of claims:** Property Manager agrees to notify Owner in writing of any claim by a third party or any incident or event that may give rise to a claim arising from the performance of the Agreement as soon as practicable, but no later than two (2) business days after their first knowledge of such claim or event.

**Special Risk or Circumstance:** Owner reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstance