



Request for Proposals

Consulting Services to Develop and Support Implementation of a Property Management Transition Plan

August 17, 2026

Objective

The Washington County Community Development Agency (CDA) is seeking proposals from qualified consulting firms or consultants to assist staff in developing and implementing a comprehensive transition plan for bringing property management and maintenance services from a third-party independent contract model to an in-house operating model by January 1, 2028. The selected consultant will work with CDA staff to assess current operations, design a practical in-house service delivery structure, identify staffing and systems needs, support resident and stakeholder communications, and guide the phased transfer of responsibilities and implementation activities necessary to achieve operational readiness by the transition date, while maintaining continuity of service and minimizing disruption to residents.

Background

The Washington County CDA provides and maintains affordable rental housing in Washington County and operates housing, redevelopment, economic development, and housing finance programs serving communities throughout the county. The CDA currently owns and operates approximately 1,150 rental units across a diverse portfolio of multifamily, senior, public housing, low-income housing tax credit, and scattered-site properties.

Property management and maintenance services for CDA-owned or CDA-controlled residential properties, for the past 20 years, have been and are currently provided through a third-party independent contract.

The CDA has determined to transition property management and maintenance services to an in-house model, with full CDA responsibility anticipated by January 1, 2028. The transition is intended to strengthen operational oversight, improve alignment with agency priorities, support consistent resident service, and build internal capacity for long-term portfolio management.

The transition will require careful planning and implementation across operations, staffing, maintenance, compliance, budget, technology, communications, risk management, and change management. The CDA seeks a consultant with experience in affordable housing operations, public or nonprofit housing agencies, property management systems, maintenance service delivery, and organizational transition planning, with demonstrated experience supporting implementation of complex operational transitions preferred.

Project Objectives

- Assess the current third-party property management and maintenance model, including services, systems, performance expectations, costs, risks, dependencies, and responsibilities that must be transitioned to the CDA.

- Define a recommended in-house operating model, including staffing structure, reporting relationships, service standards, allocation of responsibilities among CDA departments, and use of outside vendors where appropriate.
- Identify the financial, technology, legal, compliance, human resources, procurement, and operational considerations necessary for a successful transition.
- Develop a resident-centered communications and stakeholder engagement plan that promotes transparency, trust, accessibility, and continuity of service throughout the transition.
- Create a phased implementation roadmap through January 1, 2028, with milestones, decision points, responsibility transfers, dependencies, risk mitigation strategies, and go-live readiness criteria.
- Support CDA leadership and staff in implementing the transition plan, monitoring progress, addressing implementation issues, and preparing recommendations and updates for executive staff and, if requested, the CDA Board of Commissioners.

Scope of Services

A. Project Initiation and Work Plan

The consultant will meet with CDA leadership and designated project staff to confirm project goals, key questions, available information, schedule, engagement approach, and decision-making process. The consultant will prepare a detailed work plan identifying tasks, responsible parties, required CDA inputs, meeting schedule, milestones, deliverables, key dependencies, and critical activities necessary to achieve full operational readiness by January 1, 2028. The CDA anticipates completion of the initial transition plan within approximately 90 days of the contract execution.

B. Current-State Assessment

The consultant will review the current property management and maintenance operating model, including current contract scope, division of responsibilities, property management functions, maintenance workflows, service standards, reporting, resident communication practices, vendor relationships, compliance activities, and technology systems. The assessment should document current responsibilities for key functions among the CDA, the current property manager, and other service providers. It should identify which responsibilities must transition to the CDA and which functions may appropriately remain with existing CDA departments or outside vendors. The assessment should also identify strengths, gaps, risks, dependencies, and transition considerations.

C. In-House Operating Model and Staffing Structure

The consultant will recommend an in-house operating model for property management and maintenance services. This work will include recommended functions, staffing levels, position roles, supervisory structure, reporting relationships, required qualifications or certifications, after-hours and emergency response coverage, maintenance service standards, and areas where contracted vendors or specialized service providers should continue to be used. The recommended model should also consider existing CDA functions and identify where responsibilities are best retained within other CDA departments rather than transferred to Property Management.

D. Financial and Budget Analysis

The consultant will develop a cost analysis comparing the current third-party model to the proposed in-house model. The analysis should identify personnel costs, benefits, recruitment and onboarding costs, start-up costs, equipment, vehicles, tools, uniforms, phones, office needs, technology systems, software licenses, training, insurance, risk management, and other ongoing operating costs. The analysis should identify budget impacts by function and, where feasible, by property or portfolio segment.

E. Systems, Technology, and Data Transition

The consultant will identify technology and data requirements necessary to support in-house operations, including the CDA's existing use of Yardi Voyager and RentCafe, maintenance and work order systems, resident portals, leasing files, rent ledgers, compliance records, inspection records, vendor records, historical maintenance data, reporting needs, data ownership, transfer protocols, retention requirements, cybersecurity, access controls, and staff training needs.

F. Policies, Procedures, and Internal Controls

The consultant will identify policies, procedures, forms, and internal controls that must be created, revised, or adopted to support in-house property management and maintenance. Areas may include leasing, occupancy, recertifications, rent collection, resident complaints and grievances, reasonable accommodations, fair housing, maintenance standards, preventive maintenance, unit turns, inspections, procurement, vendor management, emergency response, file documentation, quality control, and staff safety.

G. Resident and Stakeholder Communications

The consultant will develop a communications plan that supports residents, staff, contractors, vendors, funders, partners, and other stakeholders before, during, and after the transition. The plan should include key messages, communication timeline, resident notice templates, frequently asked questions, meeting formats, feedback mechanisms, accessibility considerations, language access considerations, communication of changes in responsibilities and points of contact, and strategies to maintain resident confidence and continuity of service.

H. Human Resources and Change Management

The consultant will identify human resources and change management needs related to the transition, including recruitment strategy, hiring sequence and timing, compensation considerations, onboarding, staff training, supervisory support, internal communication, organizational culture, transition of institutional knowledge from the current contractor, and labor relations considerations if applicable.

I. Legal, Contractual, Procurement, and Compliance Considerations

The consultant will identify legal, contractual, procurement, and compliance issues that require CDA review or legal counsel input. This may include contract termination or transition provisions, required notices, records ownership and transfer, insurance and liability, data privacy, records retention, procurement requirements, fair housing obligations, program

compliance, and requirements associated with federal, state, local, or funding-specific housing programs.

J. Implementation Roadmap and Go-Live Readiness

The consultant will prepare a phased implementation roadmap that identifies critical path tasks, milestones, responsible parties, decision points, sequencing, dependencies, risk mitigation strategies, contingency plans, and go-live readiness criteria for full CDA assumption of property management and maintenance responsibilities by January 1, 2028. The roadmap should be practical, actionable, and suitable for use by CDA staff as an implementation management tool.

K. Performance Metrics and Post-Transition Evaluation

The consultant will recommend performance measures and quality assurance tools to evaluate the effectiveness of the in-house model. Metrics may include work order response and completion times, unit turnaround time, occupancy rate, rent collection rate, compliance findings, resident satisfaction, preventive maintenance completion, complaint resolution time, staff workload, budget performance, and service quality trends.

L. Required Deliverables

- Project work plan and schedule.
- Current-state assessment memorandum.
- Responsibility transfer matrix identifying current, transitional, and future responsibility for key property management and maintenance functions.
- Risk, gap, and dependency analysis.
- Recommended in-house operating model.
- Staffing plan, role summaries, and proposed organizational chart.
- Budget and cost analysis.
- Systems, technology, and data transition plans.
- Policy, procedure, and internal control gap analysis.
- Resident and stakeholder communications plan with sample resident materials.
- Human resources and change management recommendations.
- Legal, contractual, procurement, and compliance issue checklist.
- Phased implementation roadmap.
- Go-live readiness checklist.
- Recommended performance metrics and post-transition evaluation framework.
- Final written transition plan.
- Presentation materials for CDA leadership and, if requested, the CDA Board of Commissioners.

M. Optional Implementation Support

Proposers may identify optional services that could be provided after completion of the transition plan, including implementation support, resident meeting facilitation, recruitment support, drafting of policies and procedures, staff training, vendor transition assistance, technology implementation support, or post-transition evaluation.

NOTE: Optional services should be priced separately and clearly identified as optional.

Qualifications

Qualified respondents will demonstrate experience in affordable housing property management, maintenance operations, organizational transition planning, change management, resident communications, financial modeling, staffing analysis, compliance, and implementation planning. Experience with housing authorities and/or nonprofit or government housing operations is preferred.

Proposal Submission Requirements

Proposals should be concise, complete, and organized in the order below:

1. Cover Letter: Include the proposer's name, primary contact, address, email, phone number, and confirmation that the proposal remains valid for at least 90 days.
2. Firm Overview: Provide a brief description of the firm, ownership, size, office locations, and relevant practice areas.
3. Relevant Experience: Describe comparable projects, especially those involving property management and maintenance service transitions, affordable housing operations, public agencies, or resident communications.
4. Project Team: Identify key personnel, roles, qualifications, availability, and resumes or biographies.
5. Proposed Approach: Describe the methodology, major tasks, engagement process, assumptions, and how the consultant will work with CDA staff.
6. Work Plan and Timeline: Provide a proposed schedule with milestones and deliverables. The CDA anticipates that the selected consultant will complete the transition plan within approximately 90 days from contract execution. Proposers should recommend a realistic schedule based on the proposed scope, the availability of CDA staff and information, and the complexity of the transition. The proposed schedule should also describe the anticipated level and timing of any optional implementation support the selected consultant could provide through the January 1, 2028 transition date. The CDA may request optional implementation support after completion of the transition plan.
7. Fee Proposal: Provide a not-to-exceed fee, hourly rates, estimated hours by task, reimbursable expenses, and pricing for optional implementation support.
8. References: Provide at least three references for similar work, including contact information.
9. Sample Work Product: Provide a sample transition plan, implementation roadmap, assessment memo, or similar work product if available.
10. Conflict of Interest Disclosure: Disclose any actual, potential, or perceived conflicts of interest.

Submission Instructions

Proposals must be submitted electronically to Melissa Taphorn, Executive Director at MelissaT@washingtoncountycda.org no later than **4:30 PM CDT on Tuesday, September 1, 2026**. Late proposals may not be considered. The subject line should read: "Property Management and Maintenance Transition Plan RFP."

Questions regarding this RFP must be submitted in writing to Ms. Taphorn by August 28, 2026. Responses to questions may be shared with all known proposers.

Evaluation Criteria

Proposals will be evaluated on the following criteria and related weight out of 100 total points.

- Relevant experience with transition planning, property management and maintenance operations, and public or nonprofit housing agencies (25)
- Understanding of project goals and transition risks (20)
- Quality, clarity, and practicality of proposed approach and work plan (20)
- Qualifications and availability of project team (15)
- Resident-centered communications and change management approach (10)
- Cost reasonableness and overall value (10)

Anticipated Procurement Timeline

Barring any unforeseen circumstances, the Washington County CDA expects the procurement of consulting services to follow the following schedule.

Proposals Due	September 1, 2026
Interviews, if conducted	September 8-10, 2026
Consultant Selection	September 15, 2026
Estimated Project Start	September 21, 2026

CDA Responsibilities

The CDA anticipates providing access to available information and staff resources necessary to complete the project, including current contracts, property and portfolio information, organizational information, relevant policies and procedures, budget information, available performance reports, technology and systems information, staff interviews, meeting coordination, and leadership direction. The CDA will designate a project manager or primary point of contact for the selected consultant.

General Terms and Conditions

- The selected consultant will be required to enter into a written agreement acceptable to the CDA.
- The selected consultant must maintain insurance coverage acceptable to the CDA and comply with applicable federal, state, and local requirements.
- All materials submitted in response to this RFP may be subject to applicable public records laws.
- The consultant will disclose any actual, potential, or perceived conflict of interest and will not participate in activities that create a conflict with the interests of the CDA.
- The CDA reserves the right to reject any or all proposals, waive informalities or irregularities, request additional information, conduct interviews, negotiate scope and fee, and award a contract in the best interest of the CDA.
- Issuance of this RFP does not obligate the CDA to award a contract or pay any costs incurred in preparing a proposal.

Reservation of Rights

The CDA reserves the right to amend or cancel this RFP at any time; request clarification or additional information from any proposer; negotiate with one or more proposers; select the proposal that, in the CDA's judgment, best meets the needs of the agency; or decline to award a contract. The CDA is not required to select the lowest-cost proposal.