



## Legislation Text

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**File #:** 17-0793, **Version:** 1

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Recommendation to adopt Specifications No. RFP HE17-050 and award a contract to Casterline Associates, P.C., of Valley Forge, PA, for comprehensive accounting services, in the amount of \$224,434, authorize a 10 percent contingency in the amount of \$22,444, for a total contract amount not to exceed \$246,878, for a period of two years, with a one-year renewal option in the amount of \$114,500. (Citywide)

Authorization is requested to enter into an agreement with Casterline Associates, P.C., for professional accounting services for the Housing Authority Bureau (Bureau), in the Department of Health and Human Services.

The Request for Proposals (RFP) was advertised in the Long Beach Press-Telegram on March 16, 2017, and 4,776 potential proposers were notified of the RFP opportunity. Of those proposers, 31 downloaded the RFP via the City's electronic bid system. The RFP document was made available from the Purchasing Division, located on the seventh floor of City Hall, and the Division's website at [www.longbeach.gov/purchasing](http://www.longbeach.gov/purchasing) <file:///C:/Users/ankearb/AppData/Local/Microsoft/Windows/NetCache/Content.Outlook/NOZK1SEP/www.longbeach.gov/purchasing>. An RFP announcement was also included in the Purchasing Division's weekly update of Open Bid Opportunities, which is sent to 22 local, minority and women-owned business groups. Three proposals were received on April 6, 2017. Of those three proposers, one was a Minority-owned Business Enterprise (MBE), none were Women-owned Business Enterprises (WBEs), two were certified Small Business Enterprises (SBEs), and one was a Long Beach business (Local). The selection committee, comprised of staff from the Health and Human Services Department, determined that Casterline Associates, P.C., of Valley Forge, PA (not an MBE, WBE, SBE or Local), was the most qualified firm to provide the required services.

Casterline Associates, P.C., provides comprehensive accounting services that will include preparing and submitting the various monthly, quarterly and annual documents required by the Department of Housing and Urban Development (HUD), preparing monthly revenue/expense reports for the Bureau and the Board of Commissioners, and performing various transactions via the City's budget and accounting systems to ensure proper receipt and payment of funds for the Bureau. The firm not only provides these services for the Housing Choice Voucher (HCV) Program, but also for the various specialty programs the Bureau administers: Shelter Plus Care (SPC), Family Self-Sufficiency (FSS), Housing Opportunities for Persons with AIDS (HOPWA), and Veteran's Affairs Supportive Housing (VASH).

Casterline Associates, P.C., provides a high level of expertise in HUD accounting. This firm is

highly recognized by its peers and by HUD as being one of the leaders in the industry. They are held in such high regard that they provide training to other accounting firms and housing authorities, as well as publish a newsletter to members of the housing industry.

### **Local Business Outreach**

In an effort to align with the City's outreach goal, Long Beach businesses were encouraged to submit proposals for City contracts. The Purchasing Division also assists businesses with registering on the PlanetBids database to download the RFP specifications. Through outreach, 539 Long Beach vendors were notified to submit proposals, of which three downloaded the RFP and one submitted a proposal. The Purchasing Division is committed to continuing to perform outreach to local vendors to expand the bidder pool.

This matter was reviewed by Deputy City Attorney Linda T. Vu on August 24, 2017 and by Revenue Management Officer Geraldine Alejo on August 30, 2017.

Housing Authority Commission action to adopt Specifications No. RFP HE17-050 and award a contract concurrently is requested on September 12, 2017, to ensure that the contract is in place expeditiously.

The total contract amount will not exceed \$246,878. This includes the amount for year one in the amount of \$111,456 and year two of \$112,978 plus a 10 percent contingency for each year (\$11,146 and \$11,298, respectively). Sufficient funds are currently budgeted in the Housing Authority Fund (SR 151) in the Health and Human Services Department (HE). Funding for the next fiscal year will be requested through the FY 18 budget process. There is no local job impact associated with this recommendation.

Approve recommendation.

KELLY COLOPY  
ASSISTANT EXECUTIVE DIRECTOR

JOHN GROSS  
DIRECTOR OF FINANCIAL MANAGEMENT

APPROVED:

PATRICK H. WEST  
CITY MANAGER