Department of Procurement and Contracts (DPC)
Pre-Proposal Conference

Request for Proposal (RFP)
Resident Service Coordination Program
(Event No. 3239)

AUGUST 24, 2023

Note: This presentation is a reference and is not a replacement for the comprehensive RFP
1. If you signed in as a guest, please put the company name and your name in the chat box
2. Copies of this RFP are available on the CHA Website and the CHA Supplier Portal
   - Must be registered to download the RFP
3. A copy of this presentation will be posted on the CHA Supplier Portal
CHA MISSION
Create and sustain strong communities where seniors thrive and everyone can unlock their economic power.

CHA OFFICE OF RESIDENT SERVICES MISSION
To increase the quality of life of all residents and support their path towards economic independence.

VALUES
• Integrity
• Consistency
• Accountability with Compassion

The Resident Service Coordination Program supports the overall vision
Purpose

CHA requests proposals from qualified professional firms to provide a comprehensive Resident Service Coordination Program. CHA anticipates awarding contract(s) for a base period of two (2) years with three(3) additional one-year option periods.

**PURPOSE**

- Remain out of crisis
- Meet basic needs
- Approximately 8,700 senior residents; independent living
- Designated list of buildings (Exhibit 1-CHA Service Locations)
Scope of Services

**Resident Service Coordinators (RSCs)**
- Outreach
- Coordinate Activities and Transportation
- Assessments
- Link to Supportive Services

**Senior Community Ambassadors (SCAs)**
- Assist with Coordination
- Collaborate with CHA to Hire
- Not Paid by Selected Respondent
- Exhibit 5

**Tracking and Quality Assurance**
- CMTS is System of Record
- Resident Files
- Performance Measures
- Surveys
Fee Form

**Contract**
- Cost Reimbursement
- Two-year base term
- Three one-year option terms
- April 2024

**Fee Form**
- Separate form is required for each Region category proposal - must rank and label (separate attachment)
- Microsoft Excel and hard copy signature
- Exhibits
Key Dates

- Question Due Date: **Tuesday, August 29, 2023 at 10:00 AM CST**
- Letter of Intent to submit a proposal (RFP page 32-Attachment B)
  Due Date: **Tuesday, September 5, 2023 at 10:00 AM CST**
- Proposals Due*: **Tuesday, September 19, 2023 at 10:00 AM CST**
  *Late proposals will be rejected without being read*
- Oral Presentation: **TBD/2023-TBD**

Submittal Requirements (RFP Pages 13-18)

- All proposals must be in accordance with Article V – Submittal Requirements*
  *Non-compliance with Article V requirements may deem a proposal non-responsive*
- Respondents must submit/upload their response online at: [CHA Supplier Portal](#)
- Manual submissions will not be accepted
Letter of Intent: Please complete and upload Letter of Intent in the CHA Supplier Portal by **Tuesday, September 5, 2023 by 10:00 AM (CT)** if your firm intends to submit a proposal.

**Important:**

Once uploaded you **do not** have to hit submit. You may keep your submission in “draft” until you are ready to submit your complete and final proposal.

**Note:** This presentation is a reference and is not a replacement for the comprehensive RFP.
Notice the Vendor Submission Checklist to the right of this slide: Please be sure you include all items in your proposal – if applicable.

If forms are not included with the RFP, please download from the CHA Website. [www.thecha.org](http://www.thecha.org): Home Page ➔ Doing Business ➔ Documents and Forms

Proposals not containing all the submittal requirements may be deemed non-responsive. Each form must be individually uploaded & identified.

The Financial Information required for this RFP are:
- Accountant’s Report
- Balance Sheet (last 2 years)
- Income Statement (last 2 years)
- Cash Flow Statement (last 2 years)
- Financial Statement Footnotes (if applicable)

i. For proposals or contracts awards valued at less than $500,000, the Respondent must provide the IRS Tax transcript.

ii. For proposals or contracts awards valued at less than $1,000,000, the Respondent must provide compiled financial statements.

iii. For proposals or contracts awards valued at less than $2,500,000, the Respondent must provide reviewed financial statements.

iv. For proposals or contracts awards valued in excess of $2,500,000, the Respondent must provide audited financial statements.
Evaluation Criteria

• Technical/ Compliance/ Proposed Fees: 100 Points
  • Approach and Work Plan (50 points)
  • Past Performance (20 points)
  • Qualifications of Key Personnel (10 points)
  • Diversity and Inclusion Goals (10 points)
  • Proposed Fees (10 points)

• Oral Presentation (Optional): 30 Points
  • Vendors with an evaluation score that falls within the competitive range will be invited for oral presentations.
Diversity & Inclusion Requirements
CHA is committed to:

Diversity, Equity, and Inclusion using our resources to further advance minority, women, disadvantaged businesses (including Section 3 Businesses) and residents.

• We achieve this by:
  • Contracting with and hiring MWD/BE and S3 Businesses
  • Upholding HUD’s Section 3 rule
  • Facilitating business relationships between vendors and contractors
In accordance with the Chicago Housing Authority Diversity policy, the following are required:

<table>
<thead>
<tr>
<th>Type of Contract</th>
<th>Contract Amount</th>
<th>MBE/WBE/DBE Participation</th>
<th>Section 3 Business Subcontracting (&gt;250,000)</th>
<th>Section 3 Labor Hours (25% of which 5% is through CHA resident hires)***</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>$50,001+</td>
<td>30%</td>
<td>10%</td>
<td>25%</td>
</tr>
<tr>
<td>Supply &amp; Delivery</td>
<td>$50,001+</td>
<td>20%</td>
<td>3%*</td>
<td>N/A</td>
</tr>
<tr>
<td>Professional Services</td>
<td>$50,001+</td>
<td>20%</td>
<td>3%**</td>
<td>25%</td>
</tr>
</tbody>
</table>

*Or indirect  **excludes direct support service providers  *** Required regardless of contract amount
The CHA will require vendors to document all labor hours using the B2GNow or LCP Tracker platform.

HUD requires CHA’s compliance under the new Section 3 rule:

- 25% or more of the total labor hours worked are completed by Section 3 Workers
- 5% or more of the total labor hours worked are completed by Targeted Section 3 Workers (this 5% is part of the overall 25% requirement)

Further regulation details can be found at the provided link: https://www.hud.gov/program_offices/field_policy_mgt/section3
Documents needed to capture compliance with CHA’s contract requirements are:

- Diversity Goals Utilization Plan
- Letter of Intent
- Contract Compliance Certification
- Waiver Request-M/W/DBE (if applicable)

*Each requires a signature from the Authorized Principal of the firm.*
In order to ensure the validity of the work, the Prime Contractor must complete the Diversity Utilization Plan, listing the M/W/DBE and Section 3 firms they will contract work with, along with other pertinent contract information.

The Prime Contractors are required to subcontract 30% of the total contract value for construction contracts and 20% of the total contract value for professional contracts that total over $50,001 to an M/W/DBE certified business.

The Prime Contractors are required to subcontract 10% of the total contract value for construction contracts and 3% of the total contract value for professional contracts that total over $250,000 to Section 3 Business Concerns.

A Prime Contractor who has demonstrated its attempts, to the maximum extent feasible, to meet its CHA Section 3 contracting goals may satisfy Section 3 obligations by proposing Mentorship Program Participation, and/or Other Results-Oriented Economic Opportunities as alternative means to achieving Section 3 goals.
The Letter of Intent is completed by the M/W/DBE and/or the Section 3 Business Concern.

The CHA does not certify M/W/DBE businesses but will accept certifications from the following agencies or reciprocal agencies: City of Chicago, Cook County, Pace, Metra, Chicago Transit Authority, State of Illinois Central Management Services, Small Business Administration, WBENC and the National Minority Supplier Development Council and affiliates.

Workforce Opportunity Resource Center (WORC) within Resident Services at CHA streamlines employment opportunities for residents and low-income individuals and builds capacity for resident-owned businesses to develop and grow.

The purpose is to serve Section 3-eligible residents and participants and Section 3 Businesses by providing the resources and tools needed for economic development and individual economic independence. The team also assists CHA vendors to comply with CHA’s Section 3 goals.
If a Prime Contractor cannot meet the required M/W/DBE participation requirements in whole or part, they may submit an M/W/DBE waiver request for consideration.

*The waiver submission option is only applicable to M/W/DBE utilization goal requirement and NOT for Section 3 contracting goals.*
The Contract Compliance Certification is completed by the Prime Contractor. This form certifies that the Prime Contractor adheres to meeting the M/W/DBE and Section 3 Contract requirements under CHA’s policy as well as HUD’s Section 3 Rule 24.CFR.Part 75.
The Workforce Opportunity Resource Center (WORC)

SECTION 3
The Workforce Opportunity Resource Center (WORC) provides technical assistance to CHA contractors by:

- Assistance in posting open positions
- Hiring Section 3 individuals
- Finding Section 3 businesses for subcontracting
- In addition, they will connect with the right team if proposing an OEO opportunity.
For more information visit:

4859 S Wabash Ave. Chicago, IL 60615
Phone: 773-342-WORC (9672)
Email: worc@thecha.org
www.thecha.org/residents/worc
Timeline

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**Late Proposals Will Not Be Accepted**
Supplier Portal

- Log in to the Supplier Portal. https://supplier.thecha.org
- Submit all questions via the Supplier Portal before the posted deadline.
- Limit file names to 50 characters.
- Edit Proposals as often as necessary but Responses must be submitted before the posted deadline.
- For issues with the Portal, contact Harrette Herron-King at hherron@thecha.org.
Questions/Answers

OPEN TO ATTENDEES

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