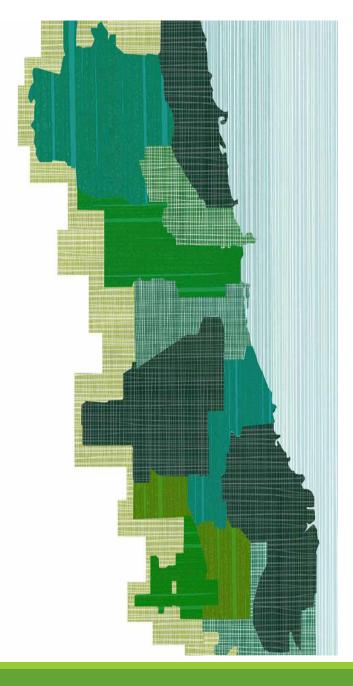


Department of Procurement and Contracts (DPC)
Pre-Proposal Conference

Request for Proposal (RFP) Mobility Counseling (Event No. 3244)

MARCH 12, 2024



Agenda



- Jessica Parent, Contract Analyst: Project Background, Mission, Purpose, Scope of Services,
 Fee Form
- **2. David Martin, Sr. Procurement Specialist:** Key Dates, Proposal Requirements, and Submission Information
- 3. Brenda Maldonado, Senior Contract Compliance Specialist: Compliance Requirements
- **4. James Matheny, Training & Technical Assistance Manager:** Workforce Opportunity Resource Center (WORC)
- 5. Questions and Answers



- 1. Please be sure to sign in with your company name, your name and contact information on the sign in sheet that can be found on the table.
- 2. Copies of this RFP are available on 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

Mission and Values



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

CHA VALUES

- People first
- Public-private partnerships extend our impact
- We are stewards of the public trust
- Diversity makes us stronger
- We measure what we value

Purpose



CHA requests proposals from qualified professional firms to provide comprehensive services for the Mobility Counseling Program.

- The Selected Respondent will work with families to learn about and identify opportunities to move to Mobility Areas, assisting them with the leasing process from start to finish.
- A Mobility Area is a community where less than 20% of resident families have an income below the poverty level and there is either (1) a below-median reported violent crime count, or (2) an area with improving poverty and violent crime rates along with significant job opportunity clusters.
- There are 42 different Mobility Areas (see Exhibit 1 Mobility Area Map), each offering quality housing, diverse neighborhoods, access to better educational resources and employment opportunities.

Scope of Services



TARGET POPULATION

- Program goal is to educate and coach participants who seek to move a Mobility Area
- Participants eligible for the Mobility Counseling program include:
 - Current CHA Housing Choice Voucher (HCV) participants, applicants, and port-ins from another
 public housing authority with at least one youth dependent age 16 or younger
 - Current HCV participants referred by CHA who are required to move due to CHA termination of a HAP contract with a landlord
 - Current public housing residents referred by CHA who are required to move due to building closure or emergency relocation
- ❖ Refer to Article IV of the RFP "Scope of Services/Statement of Work" for further information regarding eligibility parameters

OUTREACH AND ENROLLMENT

- The Selected Respondent will:
 - Work with CHA to conduct outreach to the target population (see Exhibit 3 Mobility Counseling Program Guide)
 - Screen participants for eligibility and enroll them in services
 - Provide an orientation for enrolled participants

Scope of Services (cont.)



PROGRAM FRAMEWORK

- The Selected Respondent will:
 - Work with participants to find the Mobility Area neighborhoods that best suit them (see Exhibit 1 Mobility Area Map)
 - Educate participants about the housing options within their preferred Mobility Areas
 - Assist participants with developing a Mobility Action Plan (see Exhibit 4 Mobility Action Plan Template)
 - Provide individualized coaching to participants to help alleviate any other stressors they may feel surrounding moving to a Mobility Area (see Exhibit 3 Mobility Counseling Program Guide)

COMMUNITY EDUCATION AND UNIT SELECTION

- The Selected Respondent will:
 - Provide assistance and guidance with the unit selection process
 - Coordinate and organize participant moves to each selected Mobility Area
 - Assist each participant in enrolling their dependent(s) in school and finding other educational resources within the neighborhood

Scope of Services (cont.)



FOLLOW-UP SERVICES AND INCENTIVE/SUPPORTIVE SERVICE

- The Selected Respondent will:
 - Follow-up with participants 60 days after move-in with an in-person visit to each unit (see Exhibit 6 Mobility Counseling Follow-Up Form)
 - Provide information about other services and resources available within the community and eligible CHA services available to participants
 - Administer and disburse all necessary payments and moving costs

TRACKING AND QUALITY ASSURANCE

- Client Management Tracking System (CMTS) CHA's System of Record
- Electronic Participant Files capability of securing Participant signatures electronically
- Surveys

For further questions about the services required of the Selected Respondent throughout the Mobility Counseling process, please refer to Exhibit 3 Mobility Counseling Program Guide.

Fee Proposal Form



CONTRACT

- Cost Reimbursement
- Two-year base term
- Three one-year option terms
- Anticipated August 2024 start date

FEE PROPOSAL FORM

- A completed Fee Proposal Form is required for each proposal (separate attachment)
- Each fee form should reflect services for 400 participant moves, \$750 per participant, for a total of \$300,000.00 per year
- The budget should take into account the number of staff members needed to successfully implement the program
- The fee form should be submitted both as a Microsoft Excel spreadsheet and as a signed PDF document

Key Dates



- Question Due Date: Tuesday, March 19, 2024, at 10:00 AM CST
- Letter of Intent to submit a proposal (See-Attachment B)
 - Due Date: Friday, March 15, 2024, at 10:00 AM CST
- Proposals Due*: Tuesday, April 2, 2024, at 1:00 PM CST

*Late proposals will be rejected without being read

Oral Presentation: TBD/2024-TBD

Submittal Requirements (RFP Pages 13-20)

All proposals must be in accordance with Article VI – Submittal Requirements*

*Non-compliance with Article VI requirements may deem a proposal non-responsive

- Respondents must submit/upload their response online at: <u>CHA Supplier Portal</u>
- Manual submissions will not be accepted

Request For Proposal - Letter of Intent



Letter of Intent: Please complete and upload Letter of Intent in the CHA Supplier Portal by Friday, March15, 2024 by 10:00 AM (CT) if your firm intends to submit a proposal.

Important:

Once uploaded you <u>do not</u> have to hit submit. You may keep your submission in "draft" until you are ready to submit your complete and final proposal.

ATTACHMENT B

LETTER OF INTENT TO SUBMIT A PROPOSAL REQUEST FOR PROPOSALS (RFP) EVENT # 3244 MOBILITY COUNSELING Resident Services

l,	_, the undersigned being a duly
authorized official of	hereby
acknowledges receipt of the above referenced RFP	offering and certify the intent of this
firm to submit a Proposal in response to the Reque	st.
***************************************	**************
PLEASE EXECUTE AND SUBMIT THIS FOR	RM THE SUPPLIER PORTAL AT
HTTPS://SUPPLIER.THECHA.ORG. NO LATER THA	AN Friday, March, 15, 2024 BY 10:00
AM, CST.	
***************************************	**************
FIRM'S NAME:	
ADDRESS:	
CITY:STATE:	_ZIPCODE:
TELEPHONE:WEBSI	TE:
PRINCIPAL CONTACT:	TITLE:
SIGNATURE:	DATE:
DIRECT PHONE:EMAIL:	

Required Forms - Vendor Submission Checklist

- 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: 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)
- 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.



VENDOR SUBMISSION CHECKLIST (REQUEST FOR PROPOSAL)

NITIAL NEXT TO EACH DOCUMENT BEFORE SUBMITTING

EVENT	No.:	
INTTIAL		RFP SUBMISSION REQUIREMENTS
	Electr	onic Format
	Letter	of Interest
	Qualif	ications & Experience
		ach/Work Plan
	Work	History with CHA and other Local Public Agencies
	Past P	erformance (min of 3, max of 5)
	Refere	ences (3 current)
		ization Structure & Key Personnel
	Fee Pr	roposal Form (Excel & PDF Version)
	Curre	nt Certificate of Insurance
	Joint V	Venture Agreement
		Suits, & Judgements
		Findings & Other Compliance Reports/Evaluations
		ment Statement
		cial Information (Accountant's Report, Balance Sheet, Income Statement, Cash Statement Footnotes (if applicable))
	Divers	sity Goals Utilization Plan
	Letter	of Intent M/W/DBE & Section 3 Business Concern
	Contra	act Compliance Certification Form
	Staten	nent of Bidder's Qualifications
	Subco	ntractor Information Submittal Form
	Contra	actor's Affidavit
	Econo	mic Disclosure Statement & Affidavit
	HUD I	Form 2530
	HUDI	Form 5370-C
INITIAL	MISCI	ELLANEOUS DOCUMENTS/CORRESPONDENCE

VENDOR SIGNATURE:	DATE:	
_		
SIGNATURE OF RECEIPT: _	DATE:	
[For CHA Only]		

Evaluation Criteria



- Technical/ Compliance/ Proposed Fees: 100 Points
 - Approach and Work Plan (55 points)
 - Past Performance (15 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

Contract Goals – Diversity Requirements



In accordance with the Chicago Housing Authority **Diversity policy**, the following are required:

M/W/DBE utilization requirement is:

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

^{*}Or indirect **excludes direct support service providers *** Required regardless of contract amount

Section 3 Supplemental Business subcontractor participation requirement is:

- 10% of Construction and 3% of professional services >\$250k and 3% of supply and delivery >\$2M are required to contract with a section 3 business.
- Contractor's providing services directly to CHA residents (i.e., services for the benefit of CHA youth, employment opportunities, and self-sufficiency programs) are exempt from CHA's Supplemental Section 3 Business Participation Requirements.

Contract Requirements – Section 3



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



Diversity Goals



CHA values diversity, equity, and inclusion (DEI) and seeks vendors with similar shared values, as outlined in Article VIII of CHA's Contract Requirements. To assess alignment with these principles, Respondents should answer the following questions and submit with their proposal.

01

What is your organization's strategy for Diversity Equity & Inclusion?

02

What is the racial/ethnic breakdown of your Board and staff? What percentage resides in Chicago?

03

Describe any opportunities for CHA residents including any internships, job shadowing, employment, or mentorships.

^{*}Limit responses to no more than 2 pages

Required Documents



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.



Required Document – Contract Compliance Certification



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.

CHICAGO HOUSING AUTH Department of Procurement & Contracts G		NG AUTHORITY (CHA) Intracts Contract Compliance Division
RFP/RFQ/Bidder/Proposers' M/V	•	·
Contract Compliance C	ertification	sers' M/W/DBE & Section 3 liance Certification
RFP/IFB/CONTRACT/PURCHASE ORDER NO: D	ATE FORM COMPLETED:	V/DBE and Section 3 Utilization Plans require the approval of pliance Division.
DEVELOPER NAME:		ake sure that its subcontractor(s) is/are in compliance with
PRIME CONTRACTOR NAME(S):		on compliance requirements.
ADDRESS:		ry that the contents of the forgoing certification are true and itractor to make this certification.
CONTACT NAME/TITLE:		_
E-MAIL ADDRESS:		-
M/W/DBE? (Please specify):Certifying A	gency:	_
Ethnicity: Gend	er:	e
FEDERAL TAX IDENTIFICATION OR SOCIAL SECURITY NO.:		
CONTRACT AMOUNT: \$	_	
		-
As a respondent to CHA IFB/RFP/CONTRACT or PO NUMBER_ support the policy and regulations set forth in the Amendment to Sp Section 3 Rule 24 CFR Part 75, (hereafter referred to as the Policies applicable).	ecial Conditions M/W/DBE Utilization Plan and t	he
Given that contracts awarded for work under this IFB/RFP/CONTRA whose amounts will constitute the actual dollar amount, I understanc and the Section 3 Utilization Form. Plans will be required to be submitted to the listed contractors.	that my M/W/DBE Utilization (Schedules A and	c)
Based upon the total amount of the award as constituted by all issued participation goals as outlined in the Policies and the following reports		im
Submit within five (5) business days of issuance of an award, co approved certified M/W/DBE firms On a monthly basis an updated payment report and labor (M/W/DBE and non-minority subcontractors) into B2Gnow (C software for contractors and subcontractors) Submit weekly payroll information and labor hours for constractors and labor hours for constractors and labor hours for constractors.	hours must be entered for every subcontract HA's electronic payment monitoring and labor ho	or ur
Revised 08.04.2021		
Revised Of	3.04.2021	2

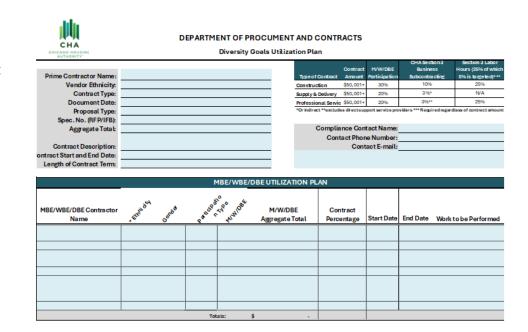
Required Document - Diversity Goals Utilization Plan



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** <u>construction contracts</u> and **20% of the total contract value for** <u>professional contracts</u> that total over \$50,001 to an M/W/DBE certified business.

			N 3 UTILIZATIO			
		SECTION 3 B	USINESS SUBCO	NTRACTING		
	S3 Cert		Percentage of			
ection 3 Business Name	Status	Current S3B Aggregate Amount	Total Contract	Start Date	End Date	Work to be Performed
Totals:		\$ -				
itline the Other Econor	nic Opportu	INDIRECT PARTICIPATIO unities to meet Diversity Goals	ON: OTHER ECO	NOMIC OPPORT	TUNITIES	



The Prime Contractors are required to **subcontract 10% of the total contract value for** <u>construction</u> <u>contracts</u> and **3% of the total contract value for** <u>professional contracts</u> 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.

Required Document – Letter of Intent



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.

	ICAGO HOUSING AUTHORITY (CHA CUREMENT & CONTRACTS CONTRACT CO		
Sub	T M/W/DBE AND/OR SECTION 3 BUSI CONTRACTORS, SUPPLIERS, CONSULTAN SUBCONTRACTOR AND/OR SELF-PERFORMING	TS	ING AUTHORITY (CHA) ONTRACTS CONTRACT COMPLIANCE DIVISION
M/W/DBE or SECTION 3 BUSINESS CON			AND/OR SECTION 3 BUSINESS CONCERN , SUPPLIERS, CONSULTANTS AND/OR SELF-PERFORMING PRIME CONTRACTOR)
M/W/DBE Certification Status: NOTE: Section 3 Business Concerns mus contract award. If yes, Section 3 Busine	t show evidence of certification with the C	siness Concern: YES NO HA Section 3 Resource Center, prior to	e above-referenced contract:
	ontrolled by low-or very low-income persont owned and controlled by current public		rests related to the Prime? Yes NO
Over 75 percent of the labor hot by Section 3 workers.	ars performed for the business over the pri	or three- month period are performed	ontractor that needs to remove or substitute a subcontractor on its he removal or substitution of the subcontractor concerned. Only when a removal or substitution of the subcontractor be done by the prime or unilaterally remove or substitute a subcontractor on its CHA/HUD
BUSINESS ADDRESS:	IICITY: GENDA		<u>vvit</u>
E-MAIL ADDRESS:	IFB/RFP/CONT	RACT OR PO #:	ith the Prime Contractor listed above within five (5) days after busing Authority.
PROJECT TITLE:	DATE FORM (OMPLETED:	perjury that the contents of the forgoing document are true and ontractor to make this affidavit.
PRIME CONTRACTOR:	(NAME)	(TELEPHONE NUMBER)	
	h a Letter of Certification from one of the ce ctors cannot also be an employee of the Pri		(DATE)
Yes No	any of the work to be performed on this		ON THIS DAY ED (NAME) the foregoing affidavit, and did state that he or she was to execute the affidavit and did so as his
Revised 12,2022	Page 1 of 2		(SEAL):
	Revised 12.2022		Page 2 of 2

Required Document – M/W/DBE Waiver Request



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.

CHICAGO HOUSING AUTHORITY (CHA)	
Department of Procurement & Contracts Contract Compliance Division	
WAIVER REQUEST: M/W/DBE PARTICIPATION COMMITMENTS	Housing Authority (CHA)
	nt & Contracts Contract Compliance Division
IFB/RFP/CONTRACT or PURCHASE ORDER NO. TITLE:	W/DBE PARTICIPATION COMMITMENTS
BIDDER/PROPOSER:	
•	penalty of perjury that the contents of the forgoing document are half of the Bidder/Proposer to make this affidavit.
ADDRESS Street City State Zip	DATE:
CONTACT PERSON: TITLE:	_
TELEPHONE #: () FAX #: ()	
	COUNTY OF
FEIN: GENDER:	
CONTRACT AMOUNT: \$	20
CONTINUE AMOUNT. 3	to me
Please select whether this is a Full or Partial Waiver Request:	d execute the foregoing affidavit, and did state that he
Full M/W/DBE Waiver Partial M/W/DBE Waiver	Company) r her free act and deed.
Full M/W/DDC Walver	i liei liee act allu ueeu.
PLEASE STATE REASON FOR WAIVER REQUEST:	
(Please note: This must be a detailed account of why you are unable to meet the requirements of the contract. Any incomplete or inconclus requests will be returned to the vendor. If more room is needed than what is provided below, please attach a clearly printed document to the	
waiver request.)	
	· ·
	CAGO HOUSING AUTHORITY USE ONLY
	REVIEW:
WHAT PERCENT OF SERVICES WILL BE PERFORMED BY BIDDER/PROPOSER?	REVIEW.
WHAT PERCENT OF SERVICES WILL BE PERFORMED BY BIDDER/PROPOSER?	
IF LESS THAN 100%, WHAT SERVICES WILL BE PERFORMED BY SOMEONE OTHER THAN BIDDER/PROPOSER?	Compliance Manager
IF LESS THAN 100%, WHAT SERVICES WILL BE PERFORMED BY SOMEONE OTHER THAN BIDDER/PROPOSER?	Compliance Manager DATE:
IF LESS THAN 100%, WHAT SERVICES WILL BE PERFORMED BY SOMEONE OTHER THAN BIDDER/PROPOSER?	·
IF LESS THAN 100%, WHAT SERVICES WILL BE PERFORMED BY SOMEONE OTHER THAN BIDDER/PROPOSER?	·
	·
IF LESS THAN 100%, WHAT SERVICES WILL BE PERFORMED BY SOMEONE OTHER THAN BIDDER/PROPOSER? DOLLAR VALUE: \$ CONTRACT TERM:	·
	·
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	·
DOLLAR VALUE: \$ CONTRACT TERM:	·
	·
DOLLAR VALUE: \$ CONTRACT TERM:	DATE:
DOLLAR VALUE: \$ CONTRACT TERM:	·

The Workforce Opportunity Resource Center (WORC)

SECTION 3

Assistance for Contractors



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:



WORKFORCE OPPORTUNITY RESOURCE CENTER

4859 S Wabash Ave. Chicago, IL 60615

Phone: 773-342-WORC (9672)

Email: worc@thecha.org www.thecha.org/residents/worc

Timeline



- Question Due Date: Tuesday, March 19, 2024, at 10:00 AM CST
- Letter of Intent to submit a proposal (Attachment B)

Due: Friday, March 15, 2024, at 10:00 AM CST

- Proposals Due: Tuesday, April 2, 2024, at 1:00 PM CST
- Oral Presentation: TBD/2024 at TBD

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. Please do not wait until deadline to submit to avoid any technical issues etc.
- For issues with the Portal, contact Harrette Herron-King at hherron@thecha.org.

Questions/Answers



OPEN TO ATTENDEES