



**CHICAGO HOUSING AUTHORITY ("CHA")
REQUEST FOR PROPOSAL ("RFP") EVENT NO. 3244 (2024)
for
MOBILITY COUNSELING**

**Required for use by
RESIDENT SERVICES**
ISSUED ON: Friday, March 1, 2024
ISSUED BY: DEPARTMENT OF PROCUREMENT AND CONTRACTS

PROPOSALS DEADLINE:
Tuesday, April 2, 2024 at 1:00 P.M., CT

Proposals may be submitted early but must be received electronically no later than the date and time listed in the solicitation.

PROPOSALS WILL NOT BE ACCEPTED AFTER THE DUE DATE AND TIME

Respondent Name: _____
Contact Name: _____
Contact Telephone: _____
Contact Email: _____

This selection process is unique to the Scope of Work described herein and notwithstanding any other proposal, qualification or bid requests provided by the Chicago Housing Authority. Proposers must comply with the requirements as defined in this RFP.

Tracey Scott
Chief Executive Officer

www.thecha.org

Sheila Johnson
Deputy Chief Procurement

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1. Exhibit-CHA Mobility Area Map
2. Exhibit-CHA Mobility Counseling Certificate of Good Standing
3. Exhibit-CHA Mobility Counseling Program Guide
4. Exhibit-CHA Mobility Action Plan Template
5. Exhibit-CHA Visual Inspection Checklist
6. Exhibit-CHA Mobility Counseling Follow-Up Form
7. Exhibit-CHA Resident Services Cost Reimbursement Procedures

ATTACHMENT A – FEE PROPOSAL FORM(S)
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ATTACHMENT B – INTENT TO BID/SUBMIT LETTER

ATTACHMENT C – VENDOR SUBMISSION CHECKLIST

ATTACHMENT D – STANDARD PROFESSIONAL SERVICES AGREEMENT
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ATTACHMENT E – REFERENCE QUESTIONNAIRE

ATTACHMENT F – UTILIZATION PLAN
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ATTACHMENT G- PERFORMANCE GOALS & OBJECTIVES

KEY INFORMATION

1. **RESPONDENT CONTACT WITH CHA:** The Procurement Specialist identified below is the *sole point of contact* regarding this RFP from the date of issuance until selection of the successful proposer(s).

David Martin, Senior Procurement Specialist

Chicago Housing Authority
Department of Procurement and Contracts
60 East Van Buren Street, 8th Floor
Chicago, Illinois 60605
Phone: (312) 786-3260
E-mail: DPMartin@thecha.org

Responses shall be submitted via the Supplier Portal at <https://supplier.thecha.org> no later than **Tuesday, April 2, 2024 by 1:00 PM, CST**.

The Proposer shall be responsible for electronic submission by the due date and time. Late proposals will be not be accepted.

An **in-person** pre-proposal conference is scheduled for **Tuesday, March 12, 2024**, at 11:00 a.m. CST to discuss the scope of services and the CHA diversity and inclusion requirements. The meeting address is **60 E. Van Buren Conference Rooms 736A-C**. In order to participate onsite, you will need to **RSVP by Monday, March 11, 2024 at 12:00 p.m.** CST with Patricia Rodriguez via email at PRodriguez@thecha.org. Please submit your Company Name, Your Name and email address confirming reservation.

CHA encourages all interested firms to attend the Pre-Proposal Conference.

The Letter of Intent to Submit a Proposal, Attachment B, is due **Friday, March 15, 2024**, at 10:00 a.m. CST. The Letter of Intent to Submit a Proposal, Attachment B must be submitted via the Supplier Portal at <https://supplier.thecha.org>.

If you do not intend to submit a proposal in response to this RFP, please submit via the Supplier Portal at <https://supplier.thecha.org>, a brief explanation in order to continue to receive future bid/RFP notices.

Questions regarding clarification or verification of these specifications and CHA diversity and inclusion requirements must be submitted via the Supplier Portal at <https://supplier.thecha.org> no later than **Tuesday, March, 19, 2024 by 10:00 AM, CT**.

Electronic Submission: CHA requires Respondents to submit an electronic proposal for the above-described Event. Respondent shall upload all documents via the CHA Supplier Portal at: <https://supplier.thecha.org>. Electronic proposal submission requires only one (1) copy. Each submittal section of the electronic proposal shall be labeled and separated into a different file as described in "ARTICLE V Submittal Requirements."

Note: There is no maximum file capacity size when uploading attachments in the Supplier Portal. If you receive an error message that states the "Maximum size is: 50" while uploading an attachment in the Supplier Portal, that error message is referring to the file naming size. The name of your file cannot be more than 50 characters. For questions or assistance with the Supplier Portal, please contact Harriet Herron-King, Procurement Coordinator, at 312-913-7356, HHerron@thecha.org.

Respondent shall bear all costs of responding to this solicitation.

ARTICLE I INTRODUCTION

CHA is the third largest public housing authority in the nation and the largest single owner of rental housing in Chicago. Through its public housing and voucher programs, CHA serves 132,000 people in almost 63,000 households across all 77 of Chicago's community areas. CHA's mission is to create and sustain strong communities where seniors thrive and everyone can unlock their economic power, ensuring that every neighborhood in Chicago has quality affordable housing and everyone feels welcome.

In its procurement of its good and services, CHA seeks relationships with vendors who share our values for inclusive and equitable contracting opportunities. CHA strives to be fair, transparent, and practical, and works to optimize the use of public funds through purchasing decisions. For more information, visit www.thecha.org.

ARTICLE II INTENT AND PURPOSE

CHA's Resident Services Division is charged with working to improve the quality of life of all residents and supporting families on a path towards self-sufficiency, which includes providing services and support for the following impact areas:

- 1) Foster Economic Independence - Help residents move forward on the path to self-sufficiency
- 2) Increase Earning Power - Help those able to work begin or advance a career to gain long-term earning potential
- 3) Support Academic Achievement - Help youth and adults succeed throughout their academic career
- 4) Enhance Stability and Quality of Life - Help families remain out of crisis and meet their basic needs; for seniors, help them age in place as long as possible

To accomplish this work, CHA requires specific services, such as those described in this solicitation. Respondents must submit a proposal that addresses all components of this RFP. CHA reserves the right to select one or more Respondents through this solicitation.

CHA anticipates it will award a cost reimbursement contract for a base period of two (2) years and reserves the right to extend the contract(s) at its sole discretion for up to three (3) additional one-year option periods. No award will be made to a Respondent that is on the list of Selected Respondent(s) ineligible to receive awards from CHA or the Federal Government, as furnished from time to time by HUD. CHA anticipates the contract resulting from this RFP to begin in August 2024.

ARTICLE III PROJECT BACKGROUND

The Mobility Counseling program is a voluntary program available to participants of the CHA Housing Choice Voucher ("HCV") program. The HCV program is administered locally and assists "very low-income families, the elderly, and the disabled to afford decent, safe, and sanitary housing in the private market". HCV participants receive assistance in the form of housing subsidies (also known as vouchers) from the CHA, and the CHA receives federal funds from the U.S. Department of Housing and Urban Development ("HUD") to administer the program. Each HCV participant who is issued a housing voucher is responsible for finding a suitable housing unit of their choice if the property owner is in agreement with all program rental requirements and

meets the minimum standards of health and safety, as determined by the CHA. Once everything has been finalized, a housing subsidy is paid directly to the property owner by the CHA on behalf of the HCV participant, who then pays the difference in rental costs.

HCV participants who choose to participate in CHA's Mobility Counseling program can utilize their housing subsidy in an effort to move to better neighborhoods within the City of Chicago. This is an important process, as it exemplifies the philosophy of "meeting individuals where they are" regarding their work towards goals of overall readiness. This idea of promoting change while continuing to be thoughtful and encouraging is essential. Through the Mobility Counseling program, participants receive additional education, support, and assistance to move into CHA-designated Mobility Areas. These areas, which have been identified as offering quality housing and diverse neighborhoods, provide access to better educational and employment opportunities that can support families as they work towards self-sufficiency.

The Mobility Counseling program has been in operation since 2012, and today, twenty-one percent of HCV households live in Mobility Areas. As of 2018, two percent of these households have participated in the Mobility Counseling program, and eighty-nine percent of households moving to Mobility Areas have remained there. Furthermore, households in Mobility Areas earn an average of seven percent (or \$1,400) more annually than households not residing in Mobility Areas.

For this solicitation, Respondents should submit a budget for 400 household moves to a Mobility Area annually, using the Fee Form included in this solicitation. While Respondents may include service elements beyond the statement work included in this solicitation, the costs for such additional service elements should not be reflected in the submitted Fee Form.

ARTICLE IV SCOPE OF SERVICES/STATEMENT OF WORK

A. Scope of Services

The Selected Respondent shall provide mobility counseling services to educate CHA Housing Choice Voucher ("HCV") participants, CHA HCV applicants, and individuals referred by CHA (collectively hereinafter referred to as "Participants") about the benefits, best practices, and process of moving to a unit located in a Mobility Area (hereinafter collectively referred to as "Services"). A Mobility Area is a community where less than 20 percent of resident families have income below the poverty level and there is either (1) a below-median reported violent crime count (normalized by the area total population), or (2) an area with improving poverty and violent crime rates along with significant job opportunity clusters (over 200 jobs per census block). Mobility Areas are published on the CHA website and are based on Community Survey data, and it is the responsibility of the Selected Respondent to check the CHA website to ensure the most current Mobility Area map (Exhibit [1]) is referenced during service delivery.

B. Statement of Work

1. Target Population

Individuals eligible for Services include:

- a. Current CHA HCV Participants with a valid CHA HCV Voucher with at least 45 days

remaining on their Voucher prior to expiration. Current CHA HCV Participants must be in good standing with a current HCV property owner as documented by CHA's Mobility Counseling Certificate of Good Standing form (Exhibit [2]). Current CHA HCV Participants must have one or more youth dependents up to age 16.

- b. Current CHA HCV Applicants with a valid CHA HCV Voucher with at least 45 days remaining on their Voucher prior to expiration. Current CHA HCV Applicants must have one or more youth dependents up to age 16.
- c. HCV port-ins from another public housing authority with at least 45 days remaining on their Voucher prior to expiration. HCV port-ins must have one or more youth dependents up to age 16.
- d. Current HCV participants referred by CHA who are required to move due to CHA terminating a HAP Contract with a landlord.
- e. Current PH residents referred by CHA who are required to move due to building closure or emergency relocation.

Participants currently residing in a Mobility Area who seek to relocate to another Mobility Area are eligible for Mobility Counseling services. However, Participants currently residing in a Mobility Area are not eligible for any incentives and will not be considered as progress towards approved Performance Goals and Objectives (Attachment G).

CHA reserves the right to refer individuals for services who are not within one of the target populations described in Section 1 of the Statement of Work contained herein.

2. Outreach and Enrollment

- a. The Selected Respondent may be required to contact current HCV Participants living in high poverty neighborhoods to attend a workshop hosted by the Selected Respondent. The Selected Respondent is responsible for securing the location and facilitating such workshops.
- b. The Selected Respondent shall be responsible for collaborating with CHA to conduct outreach to the target population. Outreach methods include, but are not limited to:
 - i. Participation at HCV briefings (virtual or in-person) as requested by CHA;
 - ii. Outreach to individuals referred by CHA or CHA service providers;
 - iii. Outreach through various media and forums (e.g., CHA website, special events, flyers in HCV satellite offices, etc.); and
 - iv. Dissemination of written information about Services.
- c. The Selected Respondent shall screen all individuals referred to confirm eligibility for Services. If a referred individual is not eligible for Services, the Selected Respondent shall ensure the individual understands the reasons why he or she is not eligible for Services.
- d. The Selected Respondent must complete an orientation with target population individuals enrolled in Services.

3. Program Framework

After Participant enrollment is complete, the Selected Respondent must offer Mobility Counseling to Participants in accordance with the approved Program Guide (Exhibit [3]), either in group or individually, during times that meet the needs of Participants, including evening and weekend hours. Mobility Counseling shall include, but not be limited to, the following:

- a. Assistance and guidance to execute unit search techniques and techniques to

- demonstrate responsible tenant qualities to property owners;
- b. Assistance with identifying prospective communities suitable for living based on Participant needs and desires;
 - c. A comparison of schools, crime statistics, transportation options and employment opportunities in different community areas to illustrate benefits of residing in a Mobility Area;
 - d. Information about options for selecting schools for youth dependents using test scores, class sizes, dollars spent per pupil, etc.;
 - e. Assistance enrolling the Participant's youth dependents, as reflected on the CHA approved lease, in the most appropriate school choice;
 - f. Information about resources available in specific community areas, guidance on locating additional community resources, how to become part of a community and conflict resolution with neighbors;
 - g. A review of tenant rights and responsibilities (e.g., lease compliance issues, Illinois and city of Chicago laws, including evictions, late payment of rent and noise and nuisance issues);
 - h. Assistance with developing a Mobility Action Plan ("MAP", Exhibit [4]) that includes specific Participant goals for moving to a Mobility Area and requirements and obligations to receive Services.
 - i. Education as to how to retrieve and review a free annual credit report; the Selected Respondent shall incorporate strategies to repair a Participant's credit into the MAP and provide referrals to financial literacy services, if necessary;
 - j. Individualized coaching to help families remove barriers to moving to a Mobility Area (e.g. guidance to address the resistance, fear or other emotions related to relocating to a new community); and
 - k. Recruitment of property owner participation in the HCV program in Mobility Areas and other areas, as approved by CHA.

4. Community Education and Unit Selection

- a. The Selected Respondent shall provide education and resources to assist Participants with unit selection. The Selected Respondent may coordinate group community tours to Mobility Areas and may conduct individual tours as requested by Participants. The Selected Respondent shall be responsible for coordinating and incurring financial responsibility for transportation costs for all community tours.
- b. The Selected Respondent shall develop materials describing the amenities and resources for each Mobility Area.
- c. The Selected Respondent shall provide Participants with information about the communities in which their unit options are located, including but not be limited to:
 - i. Public transportation routes;
 - ii. Available community and social services;
 - iii. Crime statistics;
 - iv. Daycare facilities; and
 - v. Schools and procedures for transferring or enrolling youth dependents in new schools, with a focus on high performing schools.
- d. The Selected Respondent shall identify unit options in Mobility Areas selected by Participants. The Selected Respondent shall offer to escort Participants to prospective units in the identified Mobility Area(s) and guide Participants through a unit pre-inspection process. Relocation to non-Mobility areas, as approved by CHA, may also be required.
- e. The Selected Respondent shall conduct a preliminary external examination of the building in which a prospective unit is located to determine whether the building is appropriate for

occupancy prior to submitting recommendation documentation to CHA's HCV department; the Selected Respondent shall utilize the CHA Visual Inspection Checklist (Exhibit [5]). Upon completion of the external building examination, the Selected Respondent shall deem a unit acceptable by finalizing the Request for Tenancy Approval ("RTA"). If the building is examined and deemed unacceptable, the Selected Respondent shall send the completed checklist to CHA for further action.

- f. Once a unit has been selected by the Participant, the Selected Respondent shall ensure all proper documentation (e.g., RTA, W-9, deed, etc.) is submitted to the CHA HCV department, including a request for unit inspection. All paperwork should annotate that the request is connected to the Mobility Counseling program. The Selected Respondent shall be responsible for submitting proper documentation in a timely manner.
- g. The Selected Respondent shall assist Participants in coordinating HCV unit inspections and aid Participants in the leasing process with property owners, including scheduling the move and coordinating with the property owner to obtain the lease and keys to access the unit.
- h. The Selected Respondent shall track and monitor the distribution and location of Participants in Mobility Areas and other areas, CHA has approved for relocation.

5. Follow-Up Services

- a. The Selected Respondent shall follow-up with each Participant by completing a unit visit sixty days after a Participant moves to a unit located in a Mobility Area. When necessary, the Selected Respondent shall coordinate with the property owner and/or property manager of the unit to resolve any issues that may arise with the Participant and their family. During follow up, the Selected Respondent shall:
 - i. Complete a survey identifying community, unit and family issues utilizing CHA's Mobility Counseling Follow-Up Form (Exhibit [6]). This survey must be documented in CHA's Client Management Tracking System ("CMTS") and the Participant file.
 - ii. Ensure the Participant is aware of available community and city of Chicago services.
 - iii. Verify Participant youth dependents up to age 16, as reflected on the CHA approved lease agreement, are enrolled in school, with a focus on high performing schools. The Selected Respondent shall help determine the best education choices for Participant youth dependents and help secure transportation to support school enrollment choices.
 - iv. Follow up about issues impacting Participant retention in the Mobility Area.
 - v. Provide referral to and information about other CHA services available to the Participant's family (e.g., LevelUp Program, CHA pathways to homeownership, youth opportunities, etc.). CHA will provide the Selected Respondent with updated information about available CHA services.

6. Incentive/Supportive Service

- a. The Selected Respondent shall administer and disburse payments for Participants that move to a Mobility Area based on CHA approved written guidance.
- b. The Selected Respondent shall pay for cost associated with required moves due to Housing Assistance Payment contract termination.

7. Training and Accountability

- a. The Selected Respondent shall implement appropriate safeguards to ensure a conflict of

interest does not exist for Selected Respondent personnel (e.g., listing agent or owner, or relative of same) for units targeted through Service delivery. The Selected Respondent shall ensure financial, or other incentives are not received by Selected Respondent personnel associated with Service delivery in exchange for soliciting certain prospective units. The Selected Respondent shall require all personnel assigned to provide Services to sign a conflict-of-interest statement upon being hired, and annually thereafter. Signed conflict of interest statements shall be submitted annually to CHA.

- b. The Selected Respondent shall ensure personnel are familiar with services available for HCV Program participants and actively promote these opportunities to eligible participants (e.g., LevelUp Program, Home Ownership Made Easy, Partners in Education, etc.).
- c. The Selected Respondent shall ensure personnel are familiar with CHA's HCV Administrative Plan.

8. Coordination and Collaboration

- a. The Selected Respondent shall participate in meetings with CHA's Resident Services Division as requested to review Participant progress and address any programmatic issues.
- b. The Selected Respondent shall provide consultation to CHA related to best practices of Mobility Counseling Services, including strategies to promote Services to new HCV participants.

9. File Management and Reporting

- a. The Selected Respondent shall maintain electronic Participant files using a designated platform provided by CHA. The Selected Respondent shall ensure electronic files are maintained confidentially in uniform fashion and include supporting documentation of Services provided. The Selected Respondent will need capability to secure Participant signatures electronically.
- b. The Selected Respondent shall utilize CHA's CMTS to document and manage information related to Participant activities and Service outcomes.
- c. The CHA Visual Inspection Checklist must be recorded in the Participant file.
- d. The Selected Respondent shall maintain and provide, as requested by CHA, a listing of participating property owners, realtors or managing agents and available units. The listing should contain the names, addresses, and telephone numbers of the property owners, realtors or managing agents and the property addresses, number of unit bedrooms, whether utilities are paid by the property owner or tenant, indicate whether the units are accessible to persons with disabilities as needed, and indicate if the units are in a Mobility Area.
- e. The Selected Respondent shall participate in file reviews with CHA Resident Services personnel as requested to verify data reported by the Selected Respondent in CHA's CMTS.
- f. The Selected Respondent shall comply with CHA's requests to assist CHA with its monitoring and evaluation of Services, which may include, but are not limited to:
 - i. Performance reports generated by CHA to track progress towards Service outcomes and metrics;
 - ii. Meetings with other service providers and CHA staff;
 - iii. Financial review of each invoice in accordance with the Resident Services Cost Reimbursement Procedures ([Exhibit 7](#)).
 - iv. Reporting of leverage resources and in-kind services and funding, upon request;

- v. Inventory list of assets purchased with CHA funding through the contract upon request; and
- vi. Quarterly narrative reports including progress toward goals, and challenges and successes related to Service delivery, including Participant success stories, using the format provided by CHA.
- g. CHA may administer surveys to be completed by Residents and may request the Selected Respondent to administer CHA developed surveys. The Selected Respondent shall promote the completion of surveys, as requested by CHA.

ARTICLE V GENERAL INSTRUCTIONS

A. Acceptance of Proposals

Proposals in response to this RFP must be received (electronically) through the CHA Supplier Portal. Proposals must be received electronically no later than the **date and time** listed in the solicitation. **Proposals submitted after the designated date and time will not be accepted for any reason.**

CHA reserves the right to accept or reject any or all proposals, issue addenda, or to waive any informalities. A Respondent whose proposal fails to fully comply with the requirements of the RFP may be determined to be nonresponsive and excluded from further consideration.

B. Time for Receiving Proposals

Proposals received prior to the due date and time will be maintained in a secure place, unopened. No proposal received after the deadline set forth on the cover page of this RFP will be considered. Proposals will not be publicly opened. Once submitted, proposals will become the property of CHA.

C. Right To Cancel

CHA reserves the right to cancel this procurement process whenever the best interest of CHA is served. CHA shall not be liable for costs incurred by Respondents associated with this procurement process.

D. Addenda

Any interpretations, corrections, or changes to the RFP will be made by addenda issued by CHA. Any addenda that are issued will be provided to prospective Respondents, posted on the CHA's Supplier Portal at: <https://supplier.thecha.org>, and noticed on the CHA website. It is the responsibility of the Respondent to inquire of the issuance of any addenda. Respondents shall acknowledge receipt of all addenda in the cover letter of the response. If CHA determines this RFP should be modified, it will inform all prospective Respondents by distributing addendum/addenda to this RFP before the date set for receipt of proposals.

E. False Statements

Any false statement(s) made by the Respondent (s) will void the response and eliminate the Respondent(s) from further consideration.

F. Withdrawal of Proposals

Proposals may be withdrawn by written request by the Respondent. A written withdrawal of a Proposal must be received, prior to the time set for opening of Proposals. A Respondent's negligence in preparing a Proposal creates no right of withdrawal or modification after the date and time set for opening of the Proposals.

G. Award of Contracts

CHA may award one or more Contracts according to the Evaluation Criteria contained in this RFP to responsible and responsive respondents, provided their Proposals are in the best interest of CHA. The Selected Respondent(s) will be notified at the earliest practical date. Each award may be subject to HUD approval. No award may be made to a contractor or firm that is on the list of contractors ineligible to receive awards from CHA or the United States, as furnished by HUD.

CHA reserves the right to reject any and all proposals and reserves the right to secure services solicited by this RFP by means of a non-competitive procurement in accordance with §2 CFR 200.320 (c) or to re-solicit competitive proposals.

H. Notice of Contract Award

Unsuccessful Respondents will be notified in writing after an award of contract has been made by the Contracting Officer and/or Board approval, if required.

I. Right to Protest

In accordance with CHA's Procurement Protest Procedures (copies may be obtained by contacting the department of Procurement and Contracts), all protests regarding this solicitation document must be filed no later than five (5) business days before the due date for proposals. All other protests regarding the evaluation of proposals or award of contract by the Authority must be filed no later than ten (10) business days after the notice of contract award. Any protest filed after such date will not be considered.

J. Preparatory Costs

All costs incurred in the preparation and presentation of Proposals shall be wholly borne by each Respondent. All supporting documentation and manuals submitted with each Proposal will become the property of CHA unless otherwise indicated by the Respondent at the time of submission. CHA is not liable for any costs incurred by any Respondent prior to issuance of a Notice to Proceed.

K. Confidential Material

Any material submitted by a Respondent as part of a proposal that is to be considered confidential must be clearly marked as such but may be subject to disclosure under applicable law.

L. Subcontract / Sub consultants

All subcontractors proposed to be used under the Contract must be identified within the proposal. If the proposed services include the use of subcontractors, CHA will hold the prime contractor responsible for the proposed services to be provided by the subcontractors.

M. Minimum Wage Requirements

Any award under this solicitation shall be subject to the current local minimum wage requirement and prevailing wage determination for CHA. The minimum wage requirements shall be specifically incorporated as a contractual requirement in any award and agreement resulting from this solicitation for any of the Selected Respondent's covered employees. The Respondent must take the minimum wage requirement and prevailing wage determination for CHA into consideration in determining its staffing plan for services to be performed or provided by the Respondent under its fee proposal and other submittals. Note that Federal wage determinations (either Davis-Bacon or HUD-Determined Wage Rates) preempt any conflicting State prevailing wage rate or the minimum wage requirement when the State prevailing wage rate or the minimum wage requirement is higher than the Federally imposed wage rate (24 CFR 965.101).

N. Disclosure Certification

The Contractor shall be required to make the following certification, which is included in the Contractor's Affidavit, a required submittal to be executed and notarized.

The Contractor certifies to the best of its knowledge and belief that it, its principals and any subcontractors used in the performance of this contract, meet the Agency requirements and have not violated any City or sister agency policy, codes, state, federal, or local laws, rules or regulations and have not been subject to any debarment, suspension or other disciplinary action by any government agency. Additionally, if at any time the contractor becomes aware of such information, it must immediately disclose it to the Agency.

The recommended firm(s) will be required to disclose the following information at the appropriate time during the solicitation process: Vendors' other business relationships including but not limited to: Board affiliations, positions or board memberships with all other non-profit, government and other Chicago businesses.

O. Disqualify for Conflict of Interest

CHA reserves the right to disqualify any Respondent on the basis of any real or apparent conflict of interest that is disclosed by the proposal submitted or any other data available to CHA. This disqualification is at the sole discretion of CHA. Any Respondent submitting a proposal herein waives any right to object to such disqualification now or at any future time, before any body or agency, including but not limited to, the Board of Commissioners, City Council of the City of Chicago, Mayor's Office of Chicago or any company.

P. Participation by other Local Government Agencies

Other local government agencies ("Local Government Agencies") may be eligible to purchase Services pursuant to the terms and conditions of this Contract if such agencies are authorized, by law or their governing bodies, to execute such purchases, and if such authorization is allowed by the Chicago Housing Authority Contracting Officer, and if such purchases have no significant net adverse effect on CHA and result in no observed diminished ability on the Bidder to provide the Services to CHA or user departments pursuant to such purchases. Local Government Agencies shall include without limitation: City of Chicago, Chicago Park District, Chicago Public Schools, Chicago Transit Authority, City Colleges of Chicago. All purchases and payment transactions shall be made directly between the Bidder and the requesting Local Government

Agency; CHA shall not be responsible for payment of any amounts owed by any Local Government Agency to Bidder. CHA assumes no authority, liability or obligation on behalf of any Local Government Authority

Q. Bribery, Price Fixing, or Fraud

No person or business entity shall be awarded a contract or subcontract for a period of five years from the date of conviction or entry of a plea or admission of guilt, if that person or business entity:

1. has been convicted of an act committed of bribery or attempting to bribe an officer or employee of a unit of state or local government or school district in that officer's or employee's official capacity; or
2. has been convicted of an act of bid-rigging or attempting to rig bids as defined in the Sherman Anti-Trust Act and Clayton Act (15 U.S.C. §1 et seq.), or under the laws of the State of Illinois; or has been convicted of an act of price-fixing or attempting to fix prices as defined by the Sherman Anti-Trust Act (15 U.S.C. §1 et seq.) or under the laws of the State of Illinois; or
3. has been convicted of defrauding or attempting to defraud any unit of state or local government or school district; or
4. has made an admission of guilt of such conduct as set forth in subparagraph A through C above, which admission is a matter of record, whether or not such person or business entity was subject to prosecution for the offense or offense admitted to; or
5. has entered into a plea of nolo contendere to charges of such conduct, as is set forth in subparagraphs A through C above.

For purpose of the Paragraph, "business entity" means a corporation, partnership, trust, association, unincorporated business or individually owned business. Where an official, agent or employee of a business entity committed the acts as set forth in subparagraphs A through E above on behalf of such entity and pursuant to the direction or authorization of a responsible official thereof, the business entity shall be chargeable with the conduct and be disqualified.

A business entity shall also be disqualified if it employs as an officer any individual who was an officer of another business entity at the time the latter committed a disqualifying act as set forth in subparagraphs A through D above.

A business entity shall also be disqualified if any owner directly or indirectly controls 20% or more of the business entity and was an owner who directly or indirectly controlled 20% of another business entity at the time, such business entity committed a disqualifying act as set forth in subparagraphs A through C above.

Any contract found to have been awarded in violation of this Paragraph may be voided at the discretion of CHA.

ARTICLE VI SUBMITTAL REQUIREMENTS

A. Format

Respondents shall present their proposals as a firm offer which, if accepted by CHA in its entirety, shall be binding between the parties. Electronic responses submitted via the CHA Supplier Portal at <https://supplier.thecha.org> only require one (1) complete proposal. The Respondents must also

include an indexed version of each submittal section of the electronic proposal shall be formatted, labeled and separated into a different file.

Note: There is no maximum file capacity size when uploading attachments in the Supplier Portal. *If you receive an error message that states the “Maximum size is: 50” while uploading an attachment in the Supplier Portal, that error message is referring to the file naming size. The name of your file cannot be more than 50 characters.*

Proposals not containing all the submittal requirements (See Attachment C – Vendor Submission Checklist) may be deemed non-responsive to this RFP.

B. Cover Letter and Executive Summary Form

A cover letter shall be submitted on the Respondent's letterhead, signed by a principal and the joint venture partner, if applicable. The cover letter must contain a plan explaining how services will be performed; a commitment to provide the services described in the Scope of Services of this RFP; and indicate that the offer is good for one hundred-eighty (180) days from submittal of proposal. In the cover letter, the Respondent shall also include an acknowledgement that the Respondent has read and understands the requirements of the RFP including, but not limited to, the terms and conditions of the attached Professional Services Agreement (refer to Article IX), CHA's Diversity and Inclusion requirements, Insurance and Indemnification requirements, and will comply with these requirements if awarded a contract. Proposers and Bidders shall also include the Executive Summary Form (Article X).

C. Qualifications and Experience

1. The Respondent shall submit evidence of the firm's ability to perform the work, as indicated by profiles of the principals and a description of the staffs' professional and technical competence, for those principals and staff members who will be involved in the work requested herein.
2. The Respondent must describe their qualifications, resources, and experience as it pertains to the requested services. The Respondent must demonstrate it has the experience and capacity to complete all of the required services, whether they are conducted at the same time or separately.
3. Respondent's Proposal shall include the following information: (1) the legal name of the firm, (2) a description of the primary area of expertise of the firm, (3) the names of the firm's principal(s), (4) the address, telephone number, and names of individuals to be contacted, (5) the size of the enterprise, (6) all of the firm's registration/license numbers(s) in Illinois, (7) the length of time the firm has worked in its area of expertise generally, and in Illinois if different for a different length of time, and (8) the firm may submit a general brochure of their work.

D. Approach/Workplan

The Respondent must provide a narrative describing its approach to the Scope of Services and Statement of Work including, but not limited to, project management systems to be utilized, plans for effective communications including reporting tools, and specific approaches to technical problems that may lead to cost savings for the CHA. At a minimum, Respondents must address the information outlined below in the order outlined below:

1. Submit proposed performance goals using Attachment (G)

2. Describe proposed outreach methods to encourage the target population described in this solicitation to utilize the Services. How will your organization follow up with target population individuals referred by CHA?
3. Describe workshops that will educate and encourage participants to enroll in the Mobility Counseling program.
4. Describe the proposed pre-assessment and/or intake process to determine eligibility for Services. Describe the process for communicating eligibility or ineligibility for Services after a pre-assessment and/or intake has been completed. What tools will be used to facilitate and document this process?
5. Describe the proposed orientation process and associated content to ensure individuals enrolled in Services understand their responsibility and benefits of Services.
6. Refer to the Mobility Action Plan Template (Exhibit 4). Describe additional proposed elements, if any, and the purpose of the proposed elements to supplement the Mobility Action Plan included in this solicitation.
7. Describe proposed strategies to connect Participants with resources to assist with credit repair, if necessary, and other supportive services to assist with the move to the Mobility Area or other basic needs for living.
8. Review the Mobility Counseling elements in Section 3 of the Statement of Work. Describe the “counseling” component of your Mobility Counseling program. Include a definition.
9. Describe the proposed tools and methods to educate Participants about unit selection in a Mobility Area. Describe resources that will be afforded to Participants to assist with making an informed decision regarding a unit in a Mobility Area.
10. Describe the strategy of managing a current listing of participating property owners, realtors, or managing agents and available unit options located in Mobility Areas. What measures will be taken to ensure a current and a robust listing is maintained? In what form will this listing exist (e.g., web-based, paper, etc.)?
11. Describe the proposed plan to assist Participants in finding, out of all of the currently available vacant properties, a unit that meets their needs.
12. Describe the proposed materials, amenities, and resources for each Mobility Area that will be implemented. A sample of these materials must also be submitted with each proposal.
13. Describe the proposed plan to help Participants navigate education options for their youth dependents while identifying a Mobility Area to move to.
14. Describe the proposed tools and methods to track the distribution and location of Participants in each Mobility Area.
15. Describe the proposed plan for the tools that will be used to assist with follow-up for each Participant, including for the required unit visit after the Participant has successfully moved into the Mobility Area.
16. Describe the proposed plan and tools that will be used to accurately administer the incentive/supportive service payments made to Participants who move to Mobility Areas.
17. Describe both the proposed move-related costs for which Participants should be reimbursed and the proposed supportive service payments needed to assist with the move or to support retention in the Mobility Area. Give a rationale for why these proposed costs should be submitted to CHA for consideration. Should there be a contract award, CHA will finalize these parameters.
18. Describe your firm’s approach to securing electronic signatures from Participants and organizing electronic Participant files.

19. Describe your strategy for program staffing and the rationale for each position. What is the proposed Participant-to-staff ratio?
20. Describe how your firm will manage the work if the program reaches capacity (e.g., participant-to-staff ratio is exceeded, or the contract goals are exceeded). Will you maintain a waiting list? How will this process be communicated to residents seeking Services?
21. Does your organization have the financial and administrative capacity to pay all proposed Client Support line items for Participants as services are needed to fulfill the Statement of Work and await reimbursement from CHA? If not, describe the limitations.
22. Provide a breakdown of your proposed office location(s). As it applies, include the anticipated monthly rent and occupancy costs and how the costs are allocated or leveraged.
23. Describe your proposed schedule of when services will be offered. Does your organization have the capacity to offer Services during evenings and weekend hours, if those are the times that will meet the needs of the Participants?

E. Work History with CHA and other Local Public Agencies

Respondent must list and briefly describe any past work history with CHA and other Local Public Agencies, including the specific project worked on or the specific products delivered to CHA. The project descriptions shall include, at a minimum, the scope of work performed, the location, dollar value, and list the Respondent's key personnel on the project. For each project listed, the Respondent shall provide the client's name, the contact person and their title, address and phone number. Indicate **N/A** if Respondent does not have any work history with CHA and other Local Public Agencies.

F. Past Performance

The Respondent must provide a minimum of three (3) and a maximum of five (5) project descriptions that best demonstrate their ability to perform the work outlined in the Scope of Services. Using the Past Performance Summary form (Attachment M), describe your organization's past performance delivering the services described in this solicitation. Include all corresponding formal and informal corrective action documentation provided to your organization in the past twelve months and how a solution was found. The Respondent shall use a maximum of one page to describe each project to be addressed, including each of the following:

1. The scope of work performed, the location, the dollar value (awarded versus received or reimbursed), the cost per participant, and a list of the Respondent's key personnel assigned to the project;
2. Demonstrated success in previous and current work and how that work relates to the anticipated success of the Services described in this solicitation;
3. Description of both the qualitative and the quantitative outcomes (not described in the Past Performance Summary Attachment) related to each project, whether or not the contract benchmarks were met, and if applicable, why the benchmarks were or were not achieved;
4. Performance measures demonstrating the Respondent's ability to meet the indicators included in the proposal;

5. Demonstrated history of completing projects within the awarded budget and timeline and a summary of how each of the challenges encountered in the project were overcome.

G. References

Proposers are required to provide at least three (3) references, excluding CHA, from within the past three (3) years for projects and areas of responsibility similar to those the Respondent desires to provide herein. Please include company name, contact person, mailing address, telephone number and email address. Please include a brief but detailed explanation of services provided and submit with your proposal. CHA will email any questions to the references included in your submission. Please inform your references that they will be contacted by CHA. (Attachment E)

H. Organizational Structure and Key Personnel

1. The Respondent must provide the name and resume of the program executive that will be accountable for the CHA project.
2. The Respondent must provide an organization/structure chart and include its key technical and consulting personnel who will be assigned to the CHA project team along with their resumes and the following information including, but not limited to:
 - i. Detail concerning each primary team member working with the Respondent, as well as those working in a subcontracting capacity, and a list of all current projects that each primary team member may be working on during the term of the Contract, and indicate which team member will have primary responsibility for the CHA account;
 - ii. Correlation of team members and the tasks each will be performing;
 - iii. Description of previous related experiences and projects (preferably public housing); and
 - iv. Whether or not the Respondent proposes staff who are not located in a Chicago area office (within 25 miles of the city) to work on the CHA account, and if so, their office location.
3. If a Respondent is planning to joint venture or subcontract with other companies, incorporate the relationship on the organization chart. Letters of interest from those firms and the names and credentials of their key personnel (resumes and evidence of any required licenses) should be provided. The Respondent should describe the roles and responsibilities of their subcontractors, including the key personnel as they relate to the Scope of Services for the RFP.
4. Key Personnel shall not be replaced without the prior written approval of the CHA.

I. Fee Proposal Form

The Respondent must complete the Fee Proposal Form in its entirety and return it along with this RFP package (refer to Attachment A). An electronic Microsoft Excel version of the Fee Proposal Form must be submitted in addition to a signed copy of the Fee Proposal Form, and this requirement applies to all proposed sub-contractor budgets, as well. Fee Proposal Forms should not include additional or optional services to fulfill the Statement of Work. For this RFP,

Respondents should submit a Fee Proposal Form that reflects service for 400 participants annually, along with a Participant Incentive/Supportive Service line item in the Client Support section in the amount of \$300,000 annually. All anticipated leveraged and in-kind resources should be entered into the submitted Fee Proposal Form amount column as "\$0.00", and a description and the dollar value of each leveraged and in-kind resource should be included in the description column of the fee form.

J. Insurance Requirements

The Respondent must submit a current certificate of insurance in the form required by this RFP. At the time of contract award, the Selected Respondent shall be required to provide an updated certificate of insurance, and all required endorsements adding CHA and any other required party as an additional insured, meeting the CHA's minimum insurance requirements.

K. Joint Venture Agreement

Firms entering into a joint venture must submit a copy of its joint venture agreement and all required submittals must be signed by a principal of each joint venture partner including, but not limited to, subcontractors' information submittals, and MBE/WBE/DBE and Section 3 Utilization Plans. Indicate **N/A** if Respondent will not be part of a joint venture agreement.

L. Liens, Suits, Disputes, Defaults and Judgments

Respondents shall include a detailed description of any disputes they currently are involved in, as well as a complete list of any lawsuits, disputes, defaults and judgments occurring within the last five (5) years, and all current liens, lawsuits, disputes, defaults, and judgments pending including Fair Housing claims, regulatory or tax credit violations. Indicate **N/A** if Respondent does not have any disputes, lawsuits, judgments, disputes, defaults or liens described above.

M. Audit Findings and Other Compliance Reports/Evaluations

Respondents shall submit to CHA's Department of Procurement and Contracts any third party reports or evaluations of Respondent's compliance with any applicable laws, rules, regulations, policies procedures, contract provisions, or requirements with respect to Respondent's performance of services similar in nature to those being solicited by this RFP in the past five years, including, but not limited to, any and all final findings made by an Office of the Inspector General ("OIG") or Internal Auditor (including those conducted by CHA's Inspector General and/or CHA's Internal Auditor) with respect to Respondent's performance of services, compliance with terms of a contract, findings in an Administrative or Internal Investigation, or any findings of failure to cooperate in an OIG inquiry or with Internal Auditors. Indicate **N/A** if Respondent does not have any findings described above.

N. Debarment Statement

Respondent shall submit a statement that the Respondent, its joint venture partner, if applicable, its subcontractors, vendors and staff are not debarred, suspended or otherwise prohibited from conducting business with any Federal, State or local agency.

O. Economic Disclosure Statement

Respondents must complete the attached economic disclosure statement and affidavit as referenced in the Attachments. The economic disclosure forms must be completed by the Respondent and all subcontractors in its entirety and notarized. Privately held firms and not-for-profit organizations must disclose the board of directors/corporate officers. All firms must disclose the percentage of ownership. Failure to provide complete ownership information may cause your response to be deemed non-responsive.

P. Financial Information

The Respondent/Financially Responsible Party shall demonstrate its financial responsibility by submitting the most recent two years of audited, reviewed or compiled financial statements prepared by a third party licensed Certified Public Accountant (CPA). Listed below are the minimum acceptable required documents based upon the amount of the procurement:

The Respondent must provide Financial Statements, which are compiled, reviewed and/or audited as defined below (which may be subject to different levels depending upon the Respondent's proposal and the projected contract value of the award), and which consist of:

- 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.

For proposals or contract awards valued at less than \$1,000,000 the Respondent must provide complied financial statements.

For proposals or contract awards valued at less than \$2,500,000.00, the Respondent must provide reviewed financial statements.

For proposals or contract awards valued in excess of \$2,500,000.00, the Respondent must provide audited financial statements.

CHA will also evaluate the respondents based upon analysis of third-party reporting agencies, regulatory agencies, bureaus, etc., as it deems necessary to determine the financial adequacy of the respondent entity and confirm that the entity is in good financial standing with governmental agencies.

Other considerations in the evaluation of the financial condition of Respondents follow:

- Financial statements must be from a legal business entity (i.e., corporation, partnership, LLC, etc.). The entity name and address listed on the Financial Report should match the address on file with Dun & Bradstreet report in order for CHA to perform financial review.
- If respondent is not able to provide the Financials 6 months after their fiscal year end, respondents should provide the reason for delay or non-completion.

- Newly created entities (partnerships, LLC's, etc.) must provide financial statements from the entity's general partner and/or any other financially responsible entity that collectively can demonstrate the capability to complete the contract.
- Internally prepared business entity financial reports generated by the respondent will not be accepted.
- Personal financial statements or tax returns will not be accepted.
- CHA reserves the right to request Dun & Bradstreet reports in order to make an award determination. Vendors must provide the address on file with Dun & Bradstreet if it differs from the address listed on the proposal.
- CHA reserves the right to request additional information to complete the financial evaluation and review of any respondents.

Q. Diversity Goals

CHA values diversity, equity and inclusion and seeks vendors with similar share values. Refer to Article VIII for CHA's Contract Requirements for additional detail. To enable CHA to assess this alignment, Respondent should answer the following questions and submit with their proposal (Limit responses to no more than 2 pages). **Any responses that exceed this page limit will not be considered as responsive.**

1. What is your organization's strategy for DEI?
2. What is the racial ethnicity of your Board and staff? What percentage resides Chicago?
3. Describe any opportunities for CHA residents including any internships, job shadowing, employment or mentorships.

R. Vendor Submission Checklist

Refer to Attachment C for all required submittal requirements. The following documents are exhibits to this RFP and can be found at www.thecha.org/doing-business:

1. Contract Compliance Certification
2. Letter of Intent-MWDBE and Section 3 Subs
3. Waiver Request-M/W/DBE (If **Applicable**)
4. Submittal Requirements Checklist
5. EEOC Certificate
6. Contractor's Affidavit
7. Statement of Bidder's Qualification
8. Economic Disclosure Statement
9. HUD Form 5370 or 5370-C

Proposals not containing all submittal requirements may be deemed Non-Responsive.

ARTICLE VII INSURANCE REQUIREMENTS

Prior to the commencement of this Agreement, Vendor shall procure and maintain at all times during the term of this Agreement insurance against claims for bodily injury or property damage which may arise from or in connection with services performed under this Agreement and from the negligent acts, omissions and errors of the Vendor, its officers, agents, representatives or

employees. The insurance carriers used must be authorized to conduct business in the State of Illinois and shall have an A.M. Best rating of not less than A: VII.

Minimum Coverage and Limit Requirements

1. **Commercial General Liability:** General Liability Insurance on an occurrence basis with limits not less than \$1,000,000 per occurrence with an aggregate of not less than \$2,000,000 covering bodily injury and property damage. This coverage shall also include, but not be limited to, contractual liability, products and completed operations, personal and advertising injury.
2. **Workers' Compensation and Employer's Liability:** Coverage must be in accordance with the laws of the State of Illinois and include a waiver of subrogation in favor of Chicago Housing Authority.
 - Coverage A – Statutory Limits
 - Coverage B - Employers Liability - \$500,000 bodily injury or disease each accident; each employee
3. **Auto Liability:** Required when any vehicles (owned, hired and/or non-owned) are used in connection with the Services to be performed, coverage limits of not less than \$1,000,000 each accident combined single limit for Bodily Injury and Property Damage.

Related Insurance Requirements

1. Prior to the issuing of the Notice to Proceed by the CHA, the Vendor shall submit a Certificate of Insurance via an email to the CHA Procurement Specialist, evidencing compliance with the insurance requirements set forth above. The Certificate of Insurance evidencing the minimum coverages required herein shall be in force on the Effective Date of the Contract and continuously throughout the duration. The required documentation must be received prior to the commencement of any work under this Agreement.
2. It is understood and agreed to by the parties hereto that Chicago Housing Authority and others listed below shall be included as Additional Insureds on Vendor's liability policies, with the exception of Professional Liability and Employer's Liability and such insurance is primary to and will not seek contribution from any insurance, deductibles, self-insured retentions and/or self-insured programs available to Chicago Housing Authority.

Certificate Holder: Chicago Housing Authority
60 E Van Buren
Chicago, IL 60605

Additional Insureds: Collectively referred to as the "Additional Insureds" shall include Chicago Housing Authority, Chicago Housing Administration, LLC; and/or other Partnership, Limited Liability Company as established by CHA; its respective commissioners, board members, officers, directors, agents, property management firms, agents, employees, invitees and visitors.

Primary Coverage: For any claims related to this Agreement, the Vendor's insurance coverage shall be the primary policy. The Vendor expressly understands and agrees that any insurance or self-insurance programs maintained by the CHA shall apply in excess of and shall not contribute with insurance provided by the Vendor.

3. The required coverages evidenced on the Certificate of Insurance shall be in force on the Effective Date of the Contract and must be received prior to the commencement of work under this Agreement. Copies of the endorsement(s) adding the CHA to Vendor's policy as an additional insured are required upon request. Updated Certificates of Insurance are required for policies which renew during the term of this Agreement or extensions thereof. Under no circumstances shall the Vendor allow any required coverage to lapse, cancel or non-renew throughout the duration of the Agreement or extensions thereof.
4. At the CHA's option, non-compliance will result in (1) all payments due the Vendor being withheld until the Vendor has complied with the Agreement; or (2) the Vendor will be assessed Five Hundred Dollars (\$500.00) for every day of non-compliance; or (3) the Vendor will be immediately removed from the premises and the Agreement will be terminated for default. The receipt of any certificates does not constitute agreement by the CHA that the insurance requirements in the Agreement have been fully met or that the insurance policies indicated on the certificate comply with all Agreement requirements. The insurance policies shall provide for thirty (30) days prior written notice to be given to the CHA in the event coverage is substantially changed, canceled or non-renewed.
5. The Authority in no way warrants that the minimum limits contained herein are sufficient to protect the Authority from liabilities that might arise out of the performance of the work under this Agreement by the Vendors or its Subcontractors. Vendor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages. The Vendor is not relieved of any liability or other obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain sufficient insurance. If the Vendor maintains broader coverage and/or higher limits than the minimum requirements, CHA requires and shall be entitled to the broader coverage and/or the higher limits maintained by the contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to CHA.
6. The Vendor shall require all subcontractors to carry the insurance required and adhere to the same requirements and conditions as outlined above for the duration of the Agreement. In the event that Vendor utilizes subcontractors to perform any Services under the Agreement on its behalf, Vendor shall require and verify that such subcontractors maintain the minimum insurance required herein or as appropriate for the work being performed. Vendor shall ensure that CHA is included as an additional insured on subcontractor's liability insurance.
7. The Vendor expressly understands and agrees that any insurance or self-insurance programs maintained by the CHA shall apply in excess of and will not contribute with insurance provided by the Vendor and/or any of its subcontractors.

ARTICLE VIII EVALUATION PROCESS

Proposals will be scored on a 100-point scale by an evaluation committee scoring the technical criteria in accordance with the evaluation criteria set forth below, with CHA Diversity Goals scored by Compliance and Pricing scored by Procurement. Each Respondent must indicate its fees on the attached fee form, which must be reasonable and justifiable and must reflect the proposed approach/work plan, which is being evaluated under Article VI. The CHA will make an award to the responsive and responsible Respondent whose proposal conforms to the solicitation and whose combined total score for price, compliance, technical factors, and oral presentations provides the best value. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of CHA. CHA reserves the right to perform site visits that may be included in the evaluation scoring.

The CHA will utilize a ratio method for scoring proposed fees and Best and Final Offers. With this method, the proposal with the lowest price receives the maximum points allowed (10 points). All other proposals will receive a percentage of the points available based on their price relationship to the lowest. This is determined by applying the following formula:

$$(A/B) \times C = D$$

A—the lowest Offeror's price.

B—the Offeror's price being scored.

C—the maximum number of price points available.

D—Offeror's pricing score (points).

The lowest proposed price is divided by the Respondent's price and then multiplied the maximum points allowed.

Example: The lowest proposed price is \$100,000. The next lowest proposal price is \$125,000. The maximum point total available for price is 10 points. The proposal with the \$100,000 price would receive 10 points because it is the lowest of all of the proposals. Using the lowest proposal price as a base (the numerator), we would then divide the second lowest price by the first lowest price (the denominator) and then multiply the result by the max point value (10) to determine the point value relative to the lowest price, as follows:

$$\$100,000/\$125,000 = 0.80$$

$$0.80 \times 10 = 8 \text{ (points)}$$

As such, the proposed price of \$125,000 would be awarded 8 points out of a maximum point value of 10.

Materials, information, and/or explanations should be included in each Respondent's proposal, as required in Article VI Submittal Requirements, and/or as otherwise necessary to allow the following evaluation criteria to be considered.

EVALUATION CRITERIA	MAXIMUM POINTS
APPROACH AND WORK PLAN (TECHNICAL):	55

<ul style="list-style-type: none"> • Demonstrates understanding of the Statement of Work and provides a complete summary of proposed services. (5 points) • Demonstrates a thorough understanding of the target population for services. (5 points) • Describes an engaging and meaningful Participant intake and enrollment process to determine eligibility for services, provides education and encourages enrollment. (10 points) • Provides a thorough summary of proposed curricula and assessment tools that will promote high quality services. (5 points) • Proposes a high-quality plan to ensure that Participants have the necessary tools and guidance to make an educated decision regarding a household move and unit selection. (10 points) • Demonstrates a high-quality strategy for cultivating and maintaining relevant relationships with local property owners. (5 points) • Demonstrates a high-quality plan for accurately and efficiently administering incentive payments in line with the Statement of Work. (5 points) • Demonstrates a high-quality strategy to ensure personnel have current and relevant knowledge and resources to fulfill the Statement of Work. (5 points) • Proposes a high-quality plan for providing services at locations and times that meet the needs of residents, including evening and weekend hours. (5 points) 	
<p>PAST PERFORMANCE (TECHNICAL):</p> <ul style="list-style-type: none"> • Possesses a verifiable and successful past performance of projects of similar scope as outlined in the Scope of Services and the Statement of Work. (5 points) • Demonstrates relevant past experience/work history working with the target population described in this solicitation. (5 points) • Demonstrates a history of measuring, tracking, and documenting outcomes related to the Scope of Services and the Statement of Work outlined in this solicitation. (5 points) 	15
<p>QUALIFICATIONS OF KEY PERSONNEL (TECHNICAL):</p> <ul style="list-style-type: none"> • Describes, in detail, the roles and responsibilities of key personnel, partners, and sub-contractors (if applicable) and of the experience of key personnel to complete the Statement of Work. (5 points) • Demonstrated ability and experience of personnel to complete all of the required services outlined in the Scope of Services and the Statement of Work. (5 points) 	10

DIVERSITY AND INCLUSION GOALS: <ul style="list-style-type: none"> Demonstrated understanding and quality of CHA's diversity goals, including MWDBE and Section 3 goals. (10 Points) 	10
PROPOSED FEES <ul style="list-style-type: none"> Respondent's overall proposed fee to provide services as outlined in the Statement of Work. (10 Points) 	10
TOTAL COMBINED POINTS for TECHNICAL, MBE/WBE/DBE, SECTION 3 PLAN, and PROPOSED FEES	100

After the evaluation committee has evaluated and scored the Respondents' proposals submitted in response to the RFP, the MBE/WBE/DBE, Section 3 Hiring Plan, and the Proposed fees, CHA's Contracting Officer shall establish the competitive range. If deemed necessary for the purpose of efficiency and economy, CHA has the right to limit the number of Respondents in the competitive range. Respondents within the competitive range will be notified and, unless otherwise indicated, will be required to participate in presentations and/or discussions with CHA. CHA may also require further information or clarification from the Respondents in the competitive range regarding their proposals prior to the presentations and/or discussions.

CHA, however, reserves the right to make its decision to award a contract based solely on the written submitted Proposals without any requests for presentations, formal interviews, negotiations, or further discussions.

The objectives of the presentations and/or discussions are to answer questions, clarify issues, and/or provide additional information regarding a Respondent's proposal and negotiation. Presentations will be evaluated according to the criteria established by the evaluation committee. Respondents in the competitive range will be scored on a 30-point scale. The resulting points will be added to their written proposal scores for a total score.

ORAL PRESENTATION EVALUATION CRITERIA	MAXIMUM POINTS
TOTAL ORAL PRESENTATION POINTS	30

Following the presentations and discussions, the evaluation committee members will evaluate and summarize their findings for each firm that participated and will submit the scores to Procurement. CHA will make an award to the responsive and responsible Respondent(s) whose proposal best conforms to the solicitation requirements and whose combined total score for price, compliance, technical factors, and oral presentations provides the best value to CHA. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of CHA.

CHA reserves the right to reject any and all proposals and reserves the right to secure services solicited by this RFP by means of a non-competitive proposal process in accordance with §2 CFR 200.320 (f)(4) or to re-solicit competitive proposals.

ARTICLE IX DIVERSITY AND INCLUSION GOALS

In its procurement of goods and services, CHA seeks relationships with vendors who share our values for inclusive and equitable contracting opportunities. CHA values contract diversity and is committed to strengthening workforce development and economic opportunities for low-income workers, and Minority, Women, and Disadvantaged Business, including Section 3 Businesses.

Summary of Contract Requirements

Type of Contract	M/W/DBE	Section 3 (Labor Hours)	S3 Business subcontracting (> \$250,000)	Davis Bacon
Construction	Yes	Yes	Yes	Yes
Professional Service (licensure required)	Yes	No	Yes	No
Professional Service (non- licensure required)	Yes	Yes	Yes	No
Professional Services (direct services to residents)	Yes	Yes	No	No
Material & Supply	Yes	No	Yes	No

* if not self-performing

Minimum Thresholds for Contract Diversity:

- Minority/Women/Disadvantaged Business Enterprises (M/W/DBEs)**

Certified Minority, Women, and Disadvantaged Business Enterprises (M/W/DBEs) shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with federal funds. Vendors and their subcontractors or suppliers must take all necessary and reasonable steps to ensure that M/W/DBEs have the maximum opportunity to compete for and perform contracts financed in whole or in part by federal funds. CHA establishes minimum **thresholds** for all contracts over \$50,001. The percentage is required for the entire project amount and not limited to CHA's funding. Vendors unable to meet the threshold requirement may propose indirect participation subject to CHA's written approval.

Section 3 Business Subcontracting

For contracts >\$250,000, vendors are required to subcontract to Section 3 Businesses, unless self-performing. CHA establishes minimum thresholds. To locate a Section 3 Business, visit the [Workforce Opportunity Resource Center](#) (WORC) site. Professional Services that directly provide support services for CHA residents are not required to sub-contract to Section 3.

Businesses but are encouraged to sub-contract when feasible. Vendors unable to meet the threshold requirement may propose indirect participation subject to CHA's written approval. These may include, but are not limited to mentorship programs, internships, training, and employment opportunities for non-CHA funded projects, or payment into CHA's Workforce & Education Fund.

Section 3 Labor Hours

CHA supports HUD's Section 3 requirement which counts labor hours. All applicable contracts **require at least 25% of the labor hours** performed on a project are done so with Section 3 workers and businesses, of which 5% of those hours must be performed by Targeted Section 3 workers (i.e. CHA residents and HCV participants). Vendors will report these hours via B2Gnow and/or LCPTracker or through required affidavits based on the contract type (HUD Section 3 24 CFR part 75).

Davis Bacon and Minimum Wage Requirements:

The Davis-Bacon & Related Acts apply to construction contracts over **\$2,000** and ensures that all construction employees are paid under the US Department of Labor's wage decision. Union contractors must ensure that Davis-Bacon wages are met, in accordance with the contract.

All CHA contracts must comply with the current local Minimum Wage requirement. The Minimum Wage Requirements shall be specifically incorporated as a contractual requirement in any award and agreement resulting from this solicitation for any of the Selected Respondent's covered employees. The Respondent must consider the Minimum Wage Requirement in determining its fees for services to be performed or provided by the Respondent under its fee proposal and other submittals. Note that Federal wage determinations (either Davis-Bacon or HUD-Determined Wage Rates) preempt any conflicting State prevailing wage rate or the Minimum Wage Requirement when the State prevailing wage rate or the Minimum Wage Requirement is higher than the Federally imposed wage rate (24 CFR 965).

The following chart indicates the goals set by CHA for each type of contract.

Minimum Thresholds:

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

Utilization Plan:

This chart is a list of items needed to evaluate a full utilization Plan (UP). All respondents to CHA solicitations must submit a UP which enables CHA to evaluate how they will fulfill contract requirements.

Document Name	To be Completed By	Details
Utilization Plan (UP) M/W/DBE and Section 3 Businesses	Prime Contractor	This Excel worksheet will include all M/W/DBE and Section 3 Businesses subcontracting as well as proposed indirect, etc.
Letter of Intent	Each M/W/DBE and Section 3 subcontractor listed on the UP including a self-performing Prime Contractor	If a Prime is a M/W/DBE and they are self-performing, they must submit a Letter of Intent. A Letter of Intent for each sub-contractor that is MWD/BE or Section 3 Business must also be submitted. The information outlined in the UP must correspond with the Letters.
Letter of M/W/DBE Certification	Each M/W/DBE listed on UP, including a self-performing Prime Contractor	This form must be submitted with every UP and Letter of Intent and include current certification letters. Applications are not accepted.
Waiver Request-M/W/DBE	Prime Contractor	This form is only to be used if a vendor cannot meet their subcontracting requirements and all good-faith efforts, including indirect participation, have been exhausted. The form must include (1) the scope of work and (2) the reason the Prime cannot meet the commitments outlined.
Other Economic Opportunities (OEO)	Prime Contractor	If vendor is unable to subcontract to a Section 3 Business in full or in part they will need to propose indirect participation through the OEO section on the UP, or make commensurate payment upfront into the Workforce and Education Fund, subject to approval by CHA.
Contract Compliance Certification	Prime Contractor	Acknowledgment by the Vendor of their understanding of the CHA's diversity and inclusion contract requirements.

Reporting Requirements:

Contract Requirement	System	Details
Construction Contracts	LCPtracker	Certified Payroll Reports must be entered into LCPtracker weekly. This system also tracks compliance with Davis Bacon and Section 3 hours.

Professional Services	B2GNow	Payments must be entered into B2Gnow for every pay application monthly. This system tracks and verifies Prime and Subcontractor payments made and received.
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Additional Information:

(a) COUNTING M/W/DBE AND SECTION 3 BUSINESS (S3B) CREDIT: A business that is both self-identified /certified as a Section 3 Business and certified as a M/W/DBE will count towards subcontracting requirements for both the M/W/DBE and Section 3 sub-contracting requirements.

(b) PROVIDING OPPORTUNITIES TO SECTION 3 WORKERS: In accordance with 24 CFR part 75.9, Prime and sub-contractors (including Section 3 Businesses) on CHA/HUD-funded contracts must ensure that Section 3 workers are provided economic opportunities with the following preference when applicable: a) residents of the project where the assistance is being provided; b) residents of other public housing or Section 8; c) Youthbuild participants; and d) resident of the metropolitan area.

(c) SUBSTITUTION/REMOVAL OF SUBCONTRACTOR: A prime contractor that needs to remove or substitute a subcontractor on its approved utilization plan must submit a written request for the removal or substitution of the subcontractor concerned. Only when Department of Procurement and Contracts (DPC) approves such a request in writing can the removal or substitution of the subcontractor be done by the prime contractor. Under no circumstance should a prime contractor unilaterally remove or substitute a subcontractor on its CHA/HUD-funded contract without prior approval by DPC.

Definitions

Section 3 Business are defined a business that either is a) 51% owned by public housing or housing choice voucher participant(s); b) 51% owned by a low-income person(s); or c) 75% of the labor hours are performed by low-income workers.

Davis-Bacon and Related Acts directs the US Depart of Labor to determine prevailing wage for construction projects.

Indirect Participation refers to the value of payments made to MWD/BE firms for work that is done outside of the proposed project or commensurate value to S3 Business or CHA residents/participants in other economic opportunities.

Additional information on CHA's contract requirements and forms can be found at www.thecha.org/doing-business.

ARTICLE X STANDARD PROFESSIONAL SERVICES AGREEMENT

Upon the award of a contract, the Selected Respondent(s) will execute CHA's Professional Services Agreement in substantially the same form with the same terms and conditions as set forth in the attached Agreement. A Respondent shall include, as part of its cover letter for its

proposal to CHA, an acknowledgement that it has read, understands and accepts the terms and conditions of the Agreement. **If there are any terms and conditions to which the Respondent has objections, such objections and the specific section numbers must be noted in the cover letter. The Respondent's proposed alternative language, if any, must be included as an attachment to the cover letter and such requests for revisions will be taken into consideration when determining a Respondent's responsiveness to the RFP.** A Respondent who fails to provide objections and propose alternative language shall waive its right to subsequently object to any terms of the agreement if awarded a contract by CHA (refer to Attachment D).

ARTICLE XI EXECUTIVE SUMMARY FORM

- A. The undersigned hereby acknowledges having received a full set of the Request for Proposal (RFP) Event #3244.
- B. The undersigned proposes, in accordance with all terms of the contract documents of which this proposal is a part, to perform all services in accordance with the terms and conditions specified herein. The proposer also agrees that this proposal to offer services to CHA will remain in effect for one hundred eighty (180) days from the date on which proposals are due unless a written letter of withdrawal is submitted to CHA Contracting Officer prior to the award of the contract.
- C. All prices quoted herein shall remain firm for the period of this contract and shall not increase during the initial term of the contract.

D. Company's Name: _____

Address: _____

City, State, Zip Code: _____

I do solemnly declare and affirm under penalty of perjury that the contents of the forgoing documents are true and correct, and that I am authorized, on behalf of the firm, to commit to this proposal.

Name of Preparer (print)

Title

Signature

Date

Attesting Signer's name (required for corporations)

Title

Attesting Signature (required for corporations)

Title

Contact Person's Name and Title

Telephone Number

Fax Number

Email Address

Note: Executive Summary Sheet must be completed, or Proposal may be deemed non-responsive. Rubber-stamped or typed signatures will disqualify your proposal.