



COLUMBUS METROPOLITAN HOUSING AUTHORITY

**REQUEST FOR PROPOSAL (RFP) NO.
2022-005, LINDEN SERVICE
COORDINATOR**

REQUEST FOR PROPOSAL (RFP) NO. 2022-005, LINDEN SERVICE COORDINATOR

INTRODUCTION

T Columbus Metropolitan Housing Authority (hereinafter, “HA”) is a public entity, formed in 1934 to provide federally subsidized housing and housing assistance to low-income families, in Columbus and Franklin County. CMHA is headed by a President & CEO and is governed by a Board of Commissioners and is subject to the requirements of Title 24 of the Code of Federal Regulations (hereinafter, “CFR”) and CMHA’s procurement policy. The Agency was brought into existence by resolution of the State of Ohio’s Board of Housing on May 8th, 1934. CMHA is a subdivision of the State of Ohio.

Currently, the HA owns and/or manages: (a) 26 multi-family apartment complexes totaling 3,139 units; (b) eight senior complexes, totaling 733 units; and (c) four Service Enriched complexes, totaling 258 units. the HA also administers approximately 13,500 Section 8 Housing Choice Vouchers and manages the HUD Project Based Rental Assistance contracts covering 81,000 units in Ohio and Washington, D.C. through its subsidiary, Assisted Housing Services Corporation. The HA currently has approximately 125 employees.

In keeping with its mandate to provide efficient and effective services, the HA is now soliciting proposals from qualified, licensed and insured entities to provide the services specified herein to the HA. All proposals submitted in response to this solicitation must conform to all of the requirements and specifications outlined within this document and any designated attachments in its entirety

HA CONTACT PERSON	Andrea Quinichett Purchasing Manager 614.421.4434 aquinichett@cmhanet.com
HOW TO OBTAIN THE RFP DOCUMENTS ON THE HA WEBSITE	1. Access the cmhanet.com 2. Click on the “Business Opportunities/Section 3” heading 3. Click on the “Purchasing/Open Opportunities” heading If you have any problems in accessing or registering on the system, please call the Purchasing Department at 614.421.4434
PRE-PROPOSAL CONFERENCE	Monday May 2, 2022 @ 12:00PM Join Zoom Meeting https://us02web.zoom.us/j/83290261572?pwd=TkJMVitjcnlSeU84K2ZpT0hsS2Vldz09 Meeting ID: 832 9026 1572 Passcode: 242138
HOW TO FULLY RESPOND TO THIS RFP BY SUBMITTING A PROPOSAL SUBMITTAL	As directed within Section 3.0 of the RFP document, All pricing must be submitted separately to feeproposal@cmhanet.com . All technical responses must be submitted and received to technicalresponse@cmhanet.com no later than the submittal deadline stated herein (or within any ensuing addendum).
PROPOSAL SUBMITAL RETURN & DEADLINE	Wednesday May 11 th , 2022 @ 2:00pm Note: The "electronic copy" proposals and financial information must be received by the HA by no later than 2:00pm on this date
ANTICIPATED APPROVAL BY HA BOARD OF COMMISSIONERS	May, 2022

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1. HA'S RESERVATION OF RIGHTS:

The HA reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the HA to be in its best interests.

The HA reserves the right not to award a contract pursuant to this RFP.

The HA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 30 days written notice to the successful proposer(s).

The HA reserves the right to determine the days, hours and locations that the successful proposer(s) shall provide the services called for in this RFP.

The HA reserves the right to retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the HA Contracting Officer (CO)/Purchasing Manager.

The HA reserves the right to negotiate the fees proposed by the proposer entity.

The HA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.

The HA shall have no obligation to compensate any proposer for any costs incurred in responding to this RFP.

The HA shall reserve the right to at any time during the RFP or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the HA website, www.cmhanet.com and downloading this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document, and further agrees that he/she will inform the Purchasing Manager or designee in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the HA that he/she feels needs to be addressed. Failure to abide by this time frame shall relieve the HA, but not the prospective proposer, of any responsibility pertaining to such issue.

The HA reserves the right to continue its Resident Services programs at the HA's sole discretion and expense. See Attachment J.

The HA shall pay utility bills for all rental assistance demonstration and public housing units under the terms of an existing contract.

The HA reserves the right to select a single or multiple award contract.

The HA reserves the right to add requirements during the contract period when it is in the best interest of the HA.

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2.0 SCOPE OF WORK (SOW)/TECHNICAL SPECIFICATIONS (T/S): The HA wishes to procure the services of a Linden Service Coordination Provider, to provide and operate service coordination services for two (2) housing communities, consisting of 310 units. The Authority desires the Contractor to assume responsible for the service coordination services within 60 days of contract award. Full implementation of this project must be in place by June 30, 2022. This work encompasses supportive services as part of a grant awarded to CMHA by the Ohio Capital Impact Corporation, a subsidiary of the Ohio Capital Corporation for Housing, on behalf of CVS Health.

CVS Health is an investor in the renovation of CMHA's Rosewind Estates community, located in Columbus Linden neighborhood. CVS is providing 3-year grant funding to hire a Service Coordinator to provide comprehensive supportive services to CMHA residents living in the area, including those at Rosewind Estates, Ohio Townhouses, and Housing Choice Voucher households. The total program budget for the 3-year period is \$275,000, which will include the cost of staff and program supplies to administer the project. The services will consist of site-based programming focused on improving the health and wellbeing of families living in the community. This project aligns with CVS Health's Social Justice & Equity commitment to underserved communities as well as its commitment to improving health outcomes by addressing the social determinants of health in the Columbus area. As such, the selected provider will partner with CMHA and CVS Health to implement the project and will be responsible for the tracking and reporting of program outcomes, under the direction from CMHA.

Role of the Linden Service Coordination Provider

Service coordinators at CMHA communities support residents in all areas of their lives. Service coordination includes conducting comprehensive needs assessments, creating individualized service plans based on residents' needs, connecting residents to services that will meet their specific needs, and conducting regular check-ins with residents until they successfully complete all identified goals. Service coordinators at CMHA communities should prioritize trauma-informed, culturally competent practices when working with residents. Effective service coordination requires organizations to not just provide access to their own programs and services but to ensure residents are connected to the most appropriate services to meet their needs, which is often achieved by initiating referrals to community partners. For this reason, organizations providing service coordination at CMHA communities should be able to demonstrate both a rich network of partnerships with community organizations and existing systems in place to improve accessibility and utilization of services and share data and results.

Service coordinators may connect residents to a variety of supportive services based on the community and the individual needs of a given resident, including but not limited to services that address the social determinants of health and assist residents with their finances, education, employment, and health. Social determinants of health (SDOH) refer to the conditions in which people live that affect health and quality of life outcomes. SDOH are grouped into the following five categories: economic stability, education, health and health care, neighborhood and built environment, and social and community context. Organizations providing service coordination at CMHA communities should be equipped to provide holistic service coordination that addresses each area of the SDOH and have a structure in place to track outcomes related to SDOH. In addition to providing social service referrals, service coordinators also conduct community outreach to promote resident engagement with The RISE Center, work with community organizations to coordinate on-site events and activities, and, where applicable, provide oversight for on-site community rooms and computer labs.

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General Requirements of the Linden Service Coordination Provider

The Service Coordinator responsibilities shall include, but not limited to, performing the following tasks: The Resident Initiative Department will be your main point of contact for the RISE for Linden Service Coordinator. All communications, events, and resident concerns will be communicated to assigned CMHA staff.

Hours of operation and availability must be communicated by notifying Resident Initiatives of any changes such as: absences, weekly schedule, conflicts, emergencies etc. Support/incorporate additional partnerships/initiatives. Must prepare and provide required funding and compliance reports as needed. Service Coordinator must adopt databases and platforms that CMHA utilizes such as: Findhelp, Apricot 360, etc. Service Coordinator must present to Resident Initiatives all communications and marketing materials and must have CMHA approval before distribution.

Must coordinate and collaborate with CMHA/Resident Initiatives team on upcoming events and resident resource events. Service Coordination provider must work with assigned property management company; resident council; CMHA assigned partners. Prepare budgets for anticipated and program expense (i.e. events) in the total program budget projecting any additional cost.

Program Information

CMHA-assisted Housing Communities

Rosewind (230 units) 1400 Brooks Avenue Columbus, OH 43211

Target Population: Families in Linden

Rosewind	Unit Count
1-bedroom 1-bath	16
2-bedroom TH	34
2-bedroom SFH	16
3-bedroom TH	94
3-bedroom SFH	46
4-bedroom SFH	24

Ohio Townhouses (80 units) 2775 Brentnell Avenue Columbus, OH 43211

Target Population: Families in Linden

Ohio Townhouses	Unit Count
2-bedroom 1-bath	28
3-bedroom 1.5 bath	52

Housing Choice Voucher (1,030 units) 43211

Target Population: Families in Linden

Due to the diverse household makeup found in CMHA family communities service coordinators should be prepared to offer services to residents of all ages and stages of life.

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Outside of traditional service coordination needs, residents of CMHA family communities may also benefit from assistance with coordinating workforce development opportunities, job searches, out of school time programming, parenting resources, and adult and youth educational opportunities.

Addressing social determinants of health such as health care access, food access, educational attainment, and the presence of social support networks are imperative to improving the overall health and well-being of CMHA residents living in the Linden neighborhood. For this reason, service coordinators serving CMHA’s Linden residents should be prepared to coordinate programs and events including but not limited to health fairs, cooking demonstrations, parenting support groups, fitness activities, and digital literacy trainings.

[Table No. 3]

RFP Section	Tab No.	Description
3.0.1	1	Form of Proposal: This Form is attached hereto as Attachment A to this RFP document. This 1-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.0.2	2	Form HUD-5369-A (11/92), Representations, Certifications, and Statements of Proposers, Public and Indian Housing Programs: This Form is located on the HA website as an addendum to this RFP document. This 4-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.0.2.1	2	FORM HUD-5369-B, Instructions to Offers -Non-Construction: This Form is located on the HA website as an addendum to this RFP document. This 2-page Form must be reviewed and submitted under this tab as a part of the proposal submittal.
3.0.2.2	2	Form HUD-5369-C (8/93), Certifications and Representations of Offerors, Non-Construction Contract: This Form is located on the HA website as an addendum to this RFP document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.0.3	3	Profile of Firm Form: The Profile of Firm Form is attached hereto as Attachment B to this RFP document. This 2-page Form must be fully completed, executed and submitted under this tab as a part of the proposal submittal.
3.0.4	4	Proposed Services: As more fully detailed within Section 2.0, <i>Scope of Proposal/Technical Specifications</i> , of this document, the proposer shall, at a minimum, clearly detail within the information submitted under this tab documentation showing:
3.0.4.1		As detailed within Section 4.1, Evaluation Factor No. 2, The proposer’s DEMONSTRATED EXPERIENCE in performing similar work (including honoring proposed costs and adherence to high performance standards) substantially similar to that required by this solicitation of a count of proposed project families or more.

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3.0.4.2		As detailed within Section 4.1, Evaluation Factor No. 3, herein, the proposer's QUALIFICATIONS as demonstrated by required certifications, performance standards, expertise in dealing with residents/clients and compliance.
3.0.4.4		As detailed within Section 4.1, Evaluation Factor No. 4, The proposer's MANAGEMENT & MARKETING PLAN AND REPORTING (including but not limited to staffing, operations, successful audits, and professional services offered). The proposer's REPORTING providing IT solutions for residents and owners to include, but not limited to electronic tools for online applications, work orders, payments and financial reporting. The Proposer shall disclose their anticipated Financial and Managerial software. Proposer is asked to submit samples of their: A. Sample Billing/Invoice, B. Marketing Plan per site. C. Sample resident outcome report. D. Project Budget per site. E. 30-day Implementation Plan F. Sample Activity Report
3.0.4.5		If appropriate, how service coordinator staff are selected, screened, trained, retained and monitored.
3.0.4.6		The proposed quality control program (if applicable);
3.0.4.7		An explanation and copies of forms that will be used and reports that will be submitted and the method of such reports (i.e. written; fax; internet; etc.);
3.0.4.8		A complete description of the products and services the firms provide.
3.0.5	5	Managerial Capacity/Financial Viability: The proposer entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of Attachment B, <i>Profile of Firm Form</i> . Such information shall include the proposer's qualifications to provide the services; a description of the background and current organization of the firm and three (3) years of financial statements to include cash flow (Audited financial statements are preferred) <u>or</u> equivalent as approved by the HA <u>prior</u> to submission of the Response
3.0.6	6	Client Information: The proposer shall submit a listing of former or current clients, including any other Public Housing Authority, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:
3.0.6.1		The client's name;
3.0.6.2		The client's contact name;
3.0.6.3		The client's telephone number;
3.0.6.4		A brief description and scope of the service(s) and the dates the services were provided;
3.0.7	7	Equal Employment Opportunity: The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy.
3.0.8	8	Subcontractor/Joint Venture Information (Optional Item): The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the proceeding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.
3.0.9	9	Other Information (Optional Item): The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the HA in its evaluation.

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If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." DO NOT eliminate any of the tabs.

4. Proposal Submission:

Proposal Submittal Binding Method: It is acceptable that the proposer binds the proposal submittals in such a manner that the HA can, if needed, remove the binding (i.e. "comb-type";, 3-ring binder; etc.).

Proposal Submittal Electronic Method: It is preferable and recommended that The proposer shall submit the all- inclusive technical portion of the response to technicalresponse@cmhanet.com , ensuring that all information requested in Section 3.0 Proposal Format are included.

Entry of Proposed Fees: The proposed fees shall be submitted by the proposer on the provided "Fee Sheet" (Attachment H) The Proposer shall submit this sheet to feeproposal@cmhanet.com. Do not submit, enter or refer to any fees or costs to technicalresponse@cmhanet.com. Any proposer that does so may be rejected without further consideration. A proposer must enter a proposed fee for each item--a "No Proposal" will not be allowed for any item, though a "No Charge" will be allowed for certain items. The proposed fees submitted by each proposer are inclusive of all necessary costs to provide the proposed services not otherwise provided for herein, including, but not limited to: employee costs and benefits; clerical support; overhead; profit; supplies; materials; licensing; insurance; etc. All costs incurred in the preparation of a Proposal and participation in this RFP and negotiation process shall be borne by the proposing firm.

The Columbus Metropolitan Housing Authority
Attention: Andrea Quinichett
Purchasing Manager
880 E. 11th Avenue
Columbus, Ohio 43211

The document/file exterior must clearly denote the above noted RFP number and must have the proposer's name and return address. **Proposals received after the published deadline will not be accepted.**

Submission Conditions: DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! If any such additional marks, notations or requirements are entered on any of the documents that are submitted to the HA by the proposer, such may invalidate that proposal. By accessing the noted website, www.cmhanet.com, registering and downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the HA delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.

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Submission Responsibilities: It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements and specifications set forth within all applicable documents issued by the HA, including the RFP document, the documents listed within this RFP, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing and submitting the completed documents, the proposer is stating his/her agreement to comply with all conditions and requirements set forth within those documents.

Proposer's Responsibilities--Contact with the HA: It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the Purchasing Manager or designee only. Proposers must not make inquiry or communicate with any other HA staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may be cause for the HA to not consider a proposal submittal received from any proposer who may has not abided by this directive.

Addenda: All questions and requests for information must be addressed in writing to the Purchasing Manager or Designee. The Purchasing Manager or designee will respond to all such inquiries in writing by addendum to all prospective proposers (i.e. known firms or individuals that have obtained the RFP Documents). During the RFP solicitation process, the Purchasing Manager or Designee will NOT conduct any *ex parte* conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the Purchasing Manager—it simply means that, other than making replies to direct the prospective proposer where his/her answer has already been issued within the solicitation documents, the Purchasing Manager may not respond to the prospective proposer's inquiries but will direct him/her to submit such inquiry in writing so that the Purchasing Manager may more fairly respond to all prospective proposers in writing by addendum.

Pre-proposal Conference: The scheduled pre-proposal conference identified on Page 2 of this document is, pursuant to HUD regulation, not mandatory. Typically, such conferences last 1 hour or less, though such is not guaranteed. The purpose of this conference is to assist prospective proposers in having a full understanding of the RFP documents so that he/she feels confident in submitting an appropriate proposal; therefore, at this conference the HA will conduct an overview of the RFP documents, including the attachments. Prospective proposers may also ask questions, though the Purchasing Manager or Designee may require that some such questions are delivered in writing prior to a response. Whereas the purpose of this conference is to review the RFP documents, attendees should bring a copy of the RFP documents to this conference.

General Directions to the Pre-proposal Conference:

Join Zoom Meeting

<https://us02web.zoom.us/j/83290261572?pwd=TkJMVitjcnlSeU84K2ZpT0hsS2Vldz09>

Meeting ID: 832 9026 1572

Passcode: 242138

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PROPOSAL EVALUATION:

Evaluation Factors: The following factors will be utilized by the HA to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal:

[Table No. 7]

NO.	MAX POINT VALUE	FACTOR TYPE	FACTOR DESCRIPTION
1	25 points	Objective	The PROPOSED COSTS the proposer proposes to charge the HA to provide Service Coordination Services as stated in this RFP and as provided by the Proposer on the Fee Sheet. The HA will calculate proposed costs based on: hourly wages for onsite service coordination employees.
2	35 points	Subjective (Technical)	The proposer's DEMONSTRATED EXPERIENCE & CAPACITY in performing similar work (including honoring proposed costs and adherence to high performance standards) substantially similar to the selected scope(s) of work.
3	15 Points	Subjective (Technical)	The proposer's QUALIFICATIONS as demonstrated by required certifications, performance standards, expertise in dealing with property management, public housing and compliance.
4	15 Points	Subjective (Technical)	The proposer's MANAGEMENT & MARKETING PLAN AND REPORTING (including but not limited to staffing, operations, Resident Services, successful audits/inspections, and professional services offered). The proposer's REPORTING providing IT solutions for residents and owners to include, but not limited to electronic tools for online applications, work orders, payments and financial reporting. The Proposer shall disclose their anticipated Financial and Managerial software. A. Billing/Invoice, B. Marketing Plan per site. C. Sample resident demographic report.
5	10 points	Subjective (Technical)	The OVERALL QUALITY AND PROFESSIONAL APPEARANCE OF THE PROPOSAL SUBMITTED based upon the opinion of the evaluators.
	100 points	100 points	Total Points (other than objective preference points)

Evaluation Method:

Initial Evaluation for Responsiveness: Each proposal received will first be evaluated for responsiveness (e.g., meets the minimum of the published requirements). The HA reserves the right to reject any proposals deemed by the HA not minimally responsive.

Evaluation Packet for Proposals Deemed Responsive: Internally, an evaluation packet will be prepared for each evaluator, including the following documents:

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Instructions to Evaluators;

Proposal Tabulation Form;

Written Narrative Justification;

Copy of all pertinent RFP documents.

Evaluation Committee: The HA anticipates that it will select a minimum of a five-person committee to evaluate each of the responsive “hard copy” proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. As detailed within Section 3.5 of this document, the Purchasing Manager is the only person at the HA that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.

Evaluation: The Purchasing Manager or designee will evaluate and award points pertaining to Evaluation Factors No. 1 (the “Objective” Factor). The appointed evaluation committee, independent of the Purchasing Manager or any other person at the HA, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 2, 3, 4, and 5 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the Purchasing Manager or designee.

Potential “Competitive Range” or “Best and Finals” Negotiations: The HA reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a “Best and Finals” Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the HA in a timely manner as possible, but in any case, within no longer than 10 days after the beginning of such negotiations with the firms deemed to be in the competitive range.

Determination of Top-ranked Proposer: Typically, the subjective points awarded by the evaluation committee will be combined with the objective points awarded by the CO to determine the final rankings, which is typically forwarded by the CO to the President & CEO for approval.

Ties: In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by “drawing lots or other random means of selection.”

Minimum Evaluation Results: To be considered to receive an award a proposer must receive a total calculated average of at least 70 points (of the 100 total possible points detailed within Section 4.1 herein).

Award Recommendation: It is anticipated that the final rankings will be forwarded to the HA Board of Commissioners (BOC) at a regularly scheduled board meeting for approval. The HA BOC will then make its determination as to whether or not to follow the evaluation

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committee's recommendation. Contract price negotiations may, at the HA's option, be conducted prior to or after the BOC approval.

Notice of Results of Evaluation: If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

Which proposer received the award;

Where each proposer placed in the process as a result of the evaluation of the proposals received;

The cost or financial offers received from each proposer;

Restrictions: All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the HA evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the HA evaluation committee.

5. CONTRACT AWARD:

Contract Award Procedure: If a contract is awarded pursuant to this RFP, the following detailed procedures will be followed:

By completing, executing and submitting the Form of Proposal, Attachment A, the "proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by the HA, either in hard copy or on the noted HA website, www.cmhanet.com". Accordingly, the HA has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

Contract Conditions: The following provisions are considered mandatory conditions of any contract award made by the HA pursuant to this RFP:

Contract Form: The HA is not obligated to contract on the successful proposer's form when a HA form is available, and by submitting a proposal the successful proposer agrees to do so (please note that the HA reserves the right to amend this form as the HA deems necessary). However, the HA will during the RFP process (prior to the submittal deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the HA to do so; but the failure of the HA to include such clauses does not give the successful proposer the right to refuse to execute the HA's contract form. It is the responsibility of each prospective proposer to notify the HA, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include in the final executed contract and abide by. The HA will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by the HA's response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

Please note that the HA has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFP.

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Assignment of Personnel: The HA shall retain the right to demand and receive a change in personnel assigned to the work if the HA believes that such change is in the best interest of the HA and the completion of the contracted work.

Unauthorized Sub-Contracting Prohibited: The successful proposer shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the Purchasing Manager or designee. Any purported assignment of interest or delegation of duty, without the prior written consent of the Purchasing Manager or designee shall be void and may result in the cancellation of the contract with the HA, or may result in the full or partial forfeiture of funds paid to the successful proposer as a result of the proposed contract; either as determined by the Purchasing Manager or designee.

Assignment: The HA reserves the right to award to more than one (1) qualified respondent to perform the services described herein.

Contract Period: The HA anticipates that it will initially award a contract for the period of 1 years, with options to renew for four (4) one (1) year contracts not to exceed five (5) years to be established after Board approval and the award is declared.

Licensing and Insurance Requirements: Prior to award (but not as a part of the proposal submission) the *successful proposer* will be required to provide:

An original certificate evidencing the proposer's current industrial (worker's compensation) insurance carrier and coverage amount;

An original certificate evidencing General Liability coverage, naming the HA as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the HA as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000);

An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000);

An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$50,000/\$100,000 and medical pay of \$5,000.

If applicable, a copy of the proposer's license issued by the State of Ohio licensing authority following the proposer to provide the services detailed herein.

The requested related information shall also be entered where provided for on the Profile of Firm Form (DO NOT ATTACH SUBMIT COPIES WITHIN THE PROPOSAL SUBMITTAL--we will garner the necessary certificates from the successful proposer prior to contract execution).

Right To Negotiate Final Fees: The HA shall retain the right to negotiate the amount of fees that are paid to the successful proposer, meaning the fees proposed by the top-rated

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proposer may, at the HA's options, be the basis for the beginning of negotiations. Such negotiations shall begin after the HA has chosen a top-rated proposer. If such negotiations are not, in the opinion of the Purchasing Manager or designee successfully concluded within 5 business days, the HA shall retain the right to end such negotiations and begin negotiations with the next-rated proposer.

Contract Service Standards: All work performed pursuant to this RFP must conform and comply with all applicable local, state and federal codes, statutes, laws and regulations.

6. ADDITIONAL CONSIDERATIONS:

Required Permits and Licenses: Unless otherwise stated in the RFP documents, all Federal, State or local permits and licenses which may be required to provide the services ensuing from any award of this RFP, whether or not they are known to either the HA or the proposers at the time of the proposal submittal deadline or the award, shall be the sole responsibility of the successful Proposer and all offers submitted by the Proposer shall reflect all costs required by the successful Proposer to procure and provide such necessary permits or licenses.

Taxes: All persons doing business with the HA are hereby made aware that the HA is exempt from paying Ohio State Sales and Use Taxes and Federal Exercise Taxes. A letter of Tax Exemption will be provided upon request.

Official, Agent and Employees of THE HA Not Personally Liable: It is agreed by and between the parties hereto that in no event shall any official, officer, employee, or agent of the HA in any way be personally liable or responsible for any covenant or agreement herein contained whether expressed or implied, nor for any statement, representation or warranty made herein or in any connection with this agreement.

Termination: Any contract resulting from this RFP may be terminated under the following conditions:

By mutual consent of both parties, and

Termination For Cause: As detailed within Clause No. 3 of Form HUD-5370-C (10/2006), *General Conditions for Non-Construction Contracts, Section I - (Within or without Maintenance Work)*, attached hereto:

The HA may terminate any and all contracts for default at any time in whole or in part, if the contractor fails to perform any of the provisions of any contract, so fails to pursue the work as to endanger performance in accordance with the terms of the RFP or any resulting contracts, and after receipt of written notice from the HA, fails to correct such failures within seven (7) days or such other period as the HA may authorize or require.

Upon receipt of a notice of termination issued from the HA, the Contractor shall immediately cease all activities under

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any contract resulting from this RFP, unless expressly directed otherwise by the HA in the notice of termination. The HA may terminate any contract resulting from this RFP in whole or in part, if funding is reduced, or is not obtained and continued at levels sufficient to allow for the expenditure.

Termination For Convenience: In the sole discretion of the HA, the HA may terminate any and all contracts resulting from this RFP in whole or part upon thirty (30) days prior notice to the Contractor when it is determined to be in the best interest of the HA.

The rights and remedies of the HA provided under this section are not exclusive and are in addition to any other rights and remedies provided by law or under any contract.

In the event the resulting contract from this RFP is terminated for any reason, or upon its expiration, the HA shall retain ownership of all work products including deliverables, source and object code, microcode, software licenses, and documentation in whatever form that may exist. In addition to any other provision, the Contractor shall transfer title and deliver to the HA any partially completed work products, deliverables, source and object code, or documentation that the Contractor has produced or acquired in the performance of any resulting contract.

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**FORM OF PROPOSAL
(Attachment A)**

(This Form must be fully completed and placed under Tab No. 1 of the “hard copy” tabbed proposal submittal.)

Instructions: Unless otherwise specifically required, the items listed below must be completed and included in the proposal submittal. Please complete this form by marking an “X,” where provided, to verify that the referenced completed form or information has been included within the “hard copy” proposal submittal submitted by the proposer.

X=ITEM INCLUDED	SUBMITTAL ITEMS <i>(Four copies of each proposal, including one with original signatures)</i>
_____	Tab 1 Form of Proposal (Attachment A)
_____	Tab 2 Form HUD-5369-A (located on THE HA website & page 19) Form HUD-5369-B (located on THE HA website & page 19) Form HUD-5369-C (located on THE HA website & page 19)
_____	Tab 3 Proposer’s Certification & Profile of Firm Form (Attachment B)
_____	Tab 4 Proposed Services
_____	Tab 5 Managerial Capacity/Financial Viability/Resumes
_____	Tab 6 Client Information
_____	Tab 7 Equal Employment Opportunity Statement
_____	Tab 8 Subcontractor/Joint Venture Information (Optional)
_____	Tab9 Other Information (Optional)

PROPOSER’S STATEMENT

The undersigned proposer hereby states that by completing and submitting this Form and all other documents within this proposal submittal, he/she is verifying that all information provided herein is, to the best of his/her knowledge, true and accurate, and that if the HA discovers that any information entered herein to be false, such shall entitle the HA to not consider or make award or to cancel any award with the undersigned party. Further, by completing and submitting the proposal submittal, and by entering and submitting the costs where provided within the noted Proposal Fee Sheet, the undersigned proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by the HA, either in hard copy or on the noted HA website, www.cmhanet.com, including an agreement to execute an Agreement and/or Contract. Pursuant to all RFP Documents, this Form of Proposal, and all attachments, and pursuant to all completed Documents submitted, including these forms and all attachments, the undersigned proposes to supply the HA with the services described herein for the fee(s) entered within the areas provided within the noted Proposal Fee Sheet pertaining to this RFP.

Signature Date Printed Name Company

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**PROFILE OF FIRM FORM
(Attachment B)**

(This Form must be fully completed and placed under Tab No. 3 of the "hard copy" tabbed proposal submittal.)

(1) Prime ___ Joint Venture/ Partner ___ Sub-contractor ___ (This form must be completed by and for each).

(2) Name of Firm: _____ Telephone: _____ Fax: _____

(3) Street Address, City, State, Zip: _____

(4) Please attached a brief biography/resume of the company, including the following information:

(a) Year Firm Established; (b) Year Firm Established in (Jurisdiction); (c) Former Name and Year Established (if applicable); (d) Name of Parent Company and Date Acquired (if applicable).

(5) Identify Principals/Partners in Firm (Provide resumes for each under Tab No. 3):

NAME	TITLE	% OF OWNERSHIP

(6) Identify the individual(s) that will act as project manager and any other supervisory personnel that will work on project; please submit under Tab No. 3 a brief resume for each. (Do not duplicate any resumes required above):

NAME	TITLE

(7) Identify the rate in which employees are paid:

POSITION WITHIN ORGANIZATION	MANNER OF PAY (HOURLY/COMMISSION, OTHER)

(8) Proposer Diversity Statement: You must circle all of the following that apply to the ownership of this firm and enter where provided the correct percentage (%) of ownership of each:

Caucasian Public-Held Government Non-Profit
 American (Male) Corporation Agency Organization
 _____% _____% _____% _____%

Resident- (RBE), Minority- (MBE), or Woman-Owned (WBE) Business Enterprise (Qualifies by virtue of 51% or more ownership and active management by one or more of the following:

Resident- African **Native Hispanic Asian/Pacific Hasidic Asian/Indian
 Owned* American American American American Jew American
 _____% _____% _____% _____% _____% _____% _____%

Woman-Owned Woman-Owned Disabled Other (Specify):

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(MBE) _____% (Caucasian) _____% Veteran _____% _____%

WMBE Certification Number: _____ Certified by (Agency): _____

(9) Federal Tax ID No.: _____

(10) Columbus, Ohio Business License No.: _____

(11) State of _____ License Type and No.: _____

(12) Worker's Compensation Insurance Carrier: _____

Policy No.: _____ Expiration Date: _____

(13) General Liability Insurance Carrier: _____

Policy No. _____ Expiration Date: _____

(14) Professional Liability Insurance Carrier: _____

Policy No. _____ Expiration Date: _____

(15) Debarred Statement: Has this firm, or any principal(s) ever been debarred from providing any services by the Federal Government, any state government, the State of _____, or any local government agency within or without the State of _____? Yes No

If "Yes," please attach a full detailed explanation, including dates, circumstances and current status.

(16) Disclosure Statement: Does this firm or any principals thereof have any current, past personal or professional relationship with any Commissioner or Officer of the HA? Yes No

If "Yes," please attach a full detailed explanation, including dates, circumstances and current status.

(17) Non-Collusive Affidavit: The undersigned party submitting this proposal hereby certifies that such proposal is genuine and not collusive and that said proposer entity has not colluded, conspired, connived or agreed, directly or indirectly, with any proposer or person, to put in a sham proposal or to refrain from proposing, and has not in any manner, directly or indirectly sought by agreement or collusion, or communication or conference, with any person, to fix the proposal price of affiant or of any other proposer, to fix overhead, profit or cost element of said proposal price, or that of any other proposer or to secure any advantage against the HA or any person interested in the proposed contract; and that all statements in said proposal are true.

(18) Verification Statement: The undersigned proposer hereby states that by completing and submitting this form he/she is verifying that all information provided herein is, to the best of his/her knowledge, true and accurate, and agrees that if the HA discovers that any information entered herein is false, that shall entitle the HA to not consider nor make award or to cancel any award with the undersigned party.

Signature Date Printed Name Company

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Attachment E: Proposer's Certification

By signing below, Proposer certifies that the following statements are true and correct:

1. He/she has fully authority to bind Proposer and that no member of Proposer's organization is disbarred, suspended, or otherwise prohibited from contracting with any federal, state or local agency, and the individual or business entity named in this proposal is eligible to receive the specified payment and acknowledges that this Contract may be terminated, and payment may be withheld if this certification is inaccurate.
2. Proposer proposes to furnish and deliver all items, for which proposals were provided herein, as specified in the proposal, in accordance with the terms, conditions, and specifications embodied herein, all of which terms, conditions, and specifications are hereby accepted and made a part of this proposal, all materials and supplies, which are described on the proposal worksheets herein and opposite of which prices have been entered, at the price or prices quoted, subject to valid price reductions as hereafter defined, as ordered for delivery, by THE HA.
3. Proposer agrees that this proposal shall remain open and valid for at least a period of sixty (60) days from the date of the proposal opening, or as may be specified herein, and that this proposal shall constitute an offer, which, if accepted by THE HA and subject to the terms and conditions of such acceptance, shall result in a contract between THE HA and the undersigned Proposer.
4. He/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with this proposal.
5. Proposer, (the firm, corporation, partnership, or institution represented by the Proposer), or anyone acting for such firm, corporation or institution has not violated the antitrust laws of the State of Ohio or the Federal Antitrust laws, nor communicated directly or indirectly this proposal to any competitor or any other person engaged in such line of business.
6. Proposer has not received compensation for participation in the preparation of the specifications for this solicitation.

SIGNED: _____ **Date** _____

PRINT NAME: _____

PRINT COMPANY NAME: _____

COMPANY PHONE: _____ **FAX:** _____

E-MAIL ADDRESS: _____

Attachment F: HUD FORMS

5369-A Representations, Certifications, and Other Statements of Bidders

<https://www.hud.gov/sites/documents/5369-A.PDF>

5369-B Instructions to Offerors Non-Construction

<https://www.hud.gov/sites/documents/5369-B.PDF>

5369-C (8/93), Certifications & Representations of Offerors

Non-Construction Contract

https://www.hud.gov/sites/documents/DOC_12132.PDF

5370-C Sections I & II General Conditions for Non-Construction Contracts,

(With or without Maintenance Work)

https://www.hud.gov/sites/documents/DOC_12587.PDF

https://www.haelgin.org/wp-content/uploads/2018/07/HUD_5370_sec2.pdf

Attachment G: Capacity

Please respond to the questions below. If insufficient space is provided, please provide additional response(s) on an attached sheet.

1. How many families do you currently service?
2. What is your typical ratio of on-site staff per 100 families?

_____ service coordinator staff per 100 families?

_____ additional staff per 100 families? Title: _____

3. Where are the location(s) of regional offices you currently have in Franklin County?
4. What are your performance standards for service coordinators/staff?

All other direct or indirect expenses charged to the property must be approved by the housing authority in the annual operating budget or as an approved above budget expense”.

Attachment H: Fee Sheet

Rosewind (230 units) 1400 Brooks Avenue, Columbus Ohio 43211

Target Population: Former Foster Youth

- 1. Projected Monthly hours per employee # _____
- 2. Staff assigned to project # _____
- 3. Project Annual Cost \$ _____

Ohio Townhouses (80 units) 2775 Brentnell Avenue, Columbus Ohio 43211

Target Population : Seniors

- 1. Projected Monthly hours per employee # _____
- 2. Staff assigned to project # _____
- 3. Project Annual Cost \$ _____

Housing Choice Voucher (1,030 units) 43211

Target Population: Families in Linden

- 1. Projected Monthly hours per employee # _____
- 2. Staff assigned to project # _____
- 3. Project Annual Cost \$ _____

(Must include all employee costs and benefits; clerical support; overhead; profit; supplies; materials; licensing; insurance; etc, and all other associated costs to complete the work required in the Scope of Work)

Notes:

Any additional fees must be approved by the Vice President of Resident Initiatives.

Signature

Date

Printed Name

Email

Company