

RFP 2022-1011;
Recertifications for Asset Management
and Housing Choice Voucher
ATTACHMENT A: SCOPE OF WORK



The Cincinnati Metropolitan Housing Authority (CMHA) is currently seeking a “pool” of contractors to perform the calculation of annual and interim recertifications and the processing of file for the purpose of processing annual and interim recertifications for the Public Housing Program (Section 1.0) and annual recertifications for the Housing Choice Voucher Program (HCV) (Section 2.0). Related services may be utilized at an hourly fee.

Vendors shall clearly indicate in the technical proposal and on the fee sheet which of these services they propose to provide. Proposals can be submitted for one part of the scope, or all parts. CMHA reserves the right to evaluate proposals for separate scope sections separately or jointly and award one or multiple contracts.

Vendor is also responsible for ensuring that all CMHA and HUD required forms are completed and signed off by all parties required to sign.

1.0 CONTRACTOR SCOPE- PUBLIC HOUSING PROGRAM (ASSET MANAGEMENT)

The Contractor(s) shall:

- 1.1** Perform key functions associated with rent calculation and qualification of families for the public housing in full compliance with all applicable regulations, policies and procedures of the public housing program including but not limited to CMHA’s Admissions and Continued Occupancy Policy (ACOP), Fair Housing Act, Americans with Disabilities Act and 24 CFR 960.
- 1.2** Contractor will send out the initial 120-day notice to the resident with introductory letter and application. It is the responsibility of the contractor to conduct the initial interview which may be completed in person or virtually. Request and review all required verifications and background checks to ensure that the household is qualified for the public housing program and use information to determine the amount of the rent. Contractor will begin this process no less than 120 days in advance of the anniversary date of the lease agreement.
- 1.3** Contractor will review verifications while maintaining all records and documentation used to determine eligibility/recertifications including, but not limited to, family composition, household income, background checks, and landlord tenant references.
- 1.4** Contractor will scan completed recertification packet including all supportive information such as, but not limited to, application, verifications, forms, background checks, and other needed and supporting documentation to CMHA for file retention within 7 calendar days of record completion in a safely secured encrypted format

**RFP 2022-1011;
Recertifications for Asset Management
and Housing Choice Voucher**

- 1.5** It is the contractor's responsibility to contact residents via phone, letters and other communications methods as necessary to complete the recertifications. All documentation maintained of such communication must be placed in the resident's Yardi Memo and written correspondence placed in OnBase.
- 1.6** Once approved and granted access, it will be the contractor's responsibility to pull and review EIV as required by HUD.
- 1.7** Contractor will be responsible for ensuring all data relating to the recertification (annual or interim) determinations is entered into the Yardi Property Management System/OnBase System maintained by CMHA to produce a determination letter for the applicant/resident and file is ready for the submission of the 50058 when required. CMHA will transmit the 50058 upon confirmation that the certification is complete.
- 1.8** If any additional information is required, the request will be provided in writing.
- 1.9** All files will be submitted to the contractor electronically and encrypted. Communications with any resident data must be sent electronically and encrypted to ensure the security of the resident's personal information.
- 1.10** The Contractor will be responsible for sending to the residents that fail to recertify Second Notification Letter at 90 days and Third Notification Letter at 60 days. The Third Notification letter must alert the resident to CMHA's intent to terminate their lease agreement if they fail to certify
- 1.11** The Contractor will provide property management offices with any resident that has not completed their recertification within 40 days of the anniversary date.
- 1.12** Contractor will provide reports by 2:00 P.M. daily of the status of each file with a weekly summary report. Also, provide a list of families to complete the recertification process within 30 days of due date.
- 1.13** The contractor will be responsible for sending correspondence and noting them in the resident memo.
- 1.14** The contractor will ensure the confidentiality of all information, documents, or materials viewed, discussed or provided to personnel relating to applicants and CMHA operations. The contractor's personnel shall not provide confidential information to the tenants and general public without expressed written consent of the CMHA.
- 1.15** Contractor must be knowledgeable and have experience with conducting recertifications for a Public Housing Program

**RFP 2022-1011;
Recertifications for Asset Management
and Housing Choice Voucher**



- 1.16** The contractor will manage their staff's time/schedule as needed to complete the specified services within 40 days-timeframe for recertification/interim processing and quality control services.
- 1.17** The contractor's personnel shall maintain professional working relationships with various private and government agencies and entities to obtain information and services necessary to assist families and complete the file.
- 1.18** Contractor must provide excellent customer service to residents. All calls and emails must be returned in no more than 48 business hours. A supervisor must be available should a problem need to be escalated and should the housing authority need to assist at a grievance hearing or at a court proceeding.
- 1.19** All signature lines must be completed on the forms and documents. Contractor must have the means to obtain a "wet" or electronic signature.

2.0 CONTRACTOR SCOPE-HOUSING CHOICE VOUCHER PROGRAM

The Contractor(s) shall:

- 2.1** Perform key functions associated with rent calculation and qualification of families for the housing choice voucher program in full compliance with all applicable regulations, policies and procedures of the HCV program including, but not limited to, CMHA's HCV Administrative Plan, Fair Housing Act, Americans with Disabilities Act and 24 CFR Part 982.
- 2.2** Contractor(s) will send out the initial notice to the resident with introductory letter and application to complete. It is the responsibility of the contractor to conduct the initial interview which may be completed. Contractor will request and review all required verifications and background checks to ensure that the household is qualified for the HCV housing program and use information to determine the amount of housing assistance payment (HAP), rent to owner and utility allowance.
- 2.3** It is the contractor's responsibility to contact residents via phone, letters, home visits and other communications methods as necessary to complete the recertifications. All documentation maintained of such communication must be placed in the resident's Yardi Memo and written correspondence placed in OnBase.
- 2.4** Once approved and granted access, it will be the contractor's responsibility to pull and review EIV and IVT as required by HUD.
- 2.5** Contractor will be responsible for ensuring all data relating to the recertification (annual) determinations is entered into the Yardi Property Management System/OnBase System maintained by CMHA to produce a determination letter for

RFP 2022-1011;
Recertifications for Asset Management
and Housing Choice Voucher



the applicant/resident and file is ready for the submission of the 50058 when required.

- 2.6 If any additional information is required, the request will be provided in writing.
- 2.7 All files will be submitted to the contractor electronically and encrypted. Communications with any resident data must be sent electronically and encrypted to ensure the security of the family's personal information.
- 2.8 Provide HCV department with any resident that has not completed their recertification within 40 days of the anniversary date. CMHA will transmit the 50058 upon confirmation that the certification is complete.
- 2.9 Contractor will provide reports by 2:00 P.M. daily of the status of each file and provide a list of families to complete the recertification process within 30 days of due date.
- 2.10 The contractor will be responsible for sending correspondence and noting them in the resident memo.
- 2.11 The contractor will ensure the confidentiality of all information, documents, or materials viewed, discussed or provided to personnel relating to applicants and CMHA operations. The contractor's personnel shall not provide confidential information to the tenants and general public without expressed written consent of the CMHA.
- 2.12 Contractor must be knowledgeable and have experience with conducting recertifications for a Housing Choice Voucher Program.
- 2.13 Contractor(s) will scan completed recertification packet including all supportive information such as, but not limited to, application, verifications, forms, background checks and other needed and supporting documentation to CMHA for file retention within 7 calendar days of record completion in a safely secured encrypted format. Contractor(s) must ensure that the files is delivered to CMHA complete with all necessary executed forms, verifications, and supporting documents that are audit ready for scanning into CMHA's software system. All files must be audit ready according to checklist provided.
- 2.14 The contractor will manage their staff's time/schedule as needed to complete the specified services within 40 days-timeframe for recertification processing and quality control services.
- 2.15 The contractor's personnel shall maintain professional working relationships with various private and government agencies and entities to obtain information and services necessary to assist families and complete the file.

**RFP 2022-1011;
Recertifications for Asset Management
and Housing Choice Voucher**



3.0 PERFORMANCE STANDARDS

CMHA reserves the right to deduct the following amounts from the Contractor(s) invoices for failure to perform according to the specifications of this QSP and any pursuant contract:

- 3.1** 20% deduction for failure to deliver the completed files within 30 business days of the annual recertification.
- 3.2** 10% deduction for failure to encrypt communications and files submissions with resident data.
- 3.3** 20% deduction for failure to ensure that the rent calculation and continued housing determinations are accurate and have the required supporting documentation.
- 3.4** 10% deduction for failure to provide updates on the weekly reports
- 3.5** 15% deduction for failure to aggressively pursue individuals that are non-responsive.
- 3.6** 15% for failure to respond to resident concerns within 48 business hours.
- 3.7** Deduction for failure to submit invoices within two weeks after completion of the service (see *Invoicing* in the General Terms and Conditions). If invoices are submitted late, the amount to be paid shall be reduced:

Number of days to submit invoice to CMHA after completion of work or receipt by CMHA in Yardi (whichever is later)	Performance Deduction from Invoice
<30	0%
>30	30%
>60	50%
>90	75%
>120	100% (No payment)

- 3.8** CMHA may waive the fee reductions at its discretion after discussing extenuating circumstances with the Contractor. Such waiver shall be in writing at the time of the service and may be considered by CMHA in the award of future work under this contract and award of future contracts.

4.0 THE AUTHORITY’S MOTTO AND GOLD PERFORMANCE STANDARDS

In 2012, the Authority implemented its motto “Being an Asset to Hamilton County” in addition to establishing Gold Performance Standards which consist of the principles and values by which the



RFP 2022-1011; Recertifications for Asset Management and Housing Choice Voucher

Agency performs and how our partners, vendors, contractors and consultants are measured. The Gold Performance Standards are:

<i>Respect</i>	<i>Timely</i>	<i>Exceptional</i>	<i>Initiative</i>
<i>Excellent</i>	<i>Quality</i>	<i>Accurate</i>	<i>Integrity</i>
<i>Value</i>	<i>Creativity</i>	<i>Accountability</i>	<i>Professionalism</i>

It is the Authority's intent to procure services from a contractor that shares these standards and can clearly demonstrate what they can bring to this project that no other planner can offer.

The contractor's proposal and overall presentation will be a direct reflection of their understanding of the Authority's Gold Performance Standards, i.e. quality, creativity and professionalism that the Authority may expect of the contractor as evaluated in the Gold Performance Standard Evaluation Factor.

5.0 CONTRACT TERMS

5.1 Contract Term- The Authority intends to enter into a one-year contract with the option, at the Authority's sole discretion, to extend four one-year contracts with the successful offeror(s) selected to provide the services.

5.2 Indefinite Quantities Contract (IQC) CMHA does not guarantee any minimum or maximum amount of work as a result of any award ensuing from this RFP, but will reserve the right to award work on an as-needed basis.

5.2.1 Guaranteed Contract Minimum Amount and Not-to-exceed Maximum Amount: As may be further detailed herein, as the ensuing contract will be an Indefinite Quantities Contract (IQC), which, pursuant to HUD regulation, requires CMHA to award the responsive and responsible contractor a Guaranteed Contract Minimum Amount (GCMA) and Not-to-exceed Maximum Contract Amount (NMCA) of work, those required minimum and maximum contract levels are: (a) GCMA: \$100; (b) NMCA: \$364,000 annually for Housing Choice Voucher (HCV) and \$290,000 for Public Housing (Asset Management). CMHA reserves the right to adjust these amounts, if in its best interest to do so, prior to contract approval.

6.0 CONFLICT OF INTEREST

6.1 Due to the sensitive nature of the information required for recertification and the potential for impropriety or the appearance of impropriety, Contractor shall not employ participants of either the CMHA Public Housing Program or the CMHA Housing Choice Voucher Program in the recertification process. Nothing in this term shall prevent contractor from hiring participants in either program in positions not directly responsible for recertification review and approval.



**RFP 2022-1011;
Recertifications for Asset Management
and Housing Choice Voucher**

7.0 CONTRACTOR RESPONSIBILITY FOR PRIVATE INFORMATION

- 7.1** Contractor shall make all efforts to safeguard the information of tenants and applicants to programs. Contractor shall bear all legal and financial responsibility for the consequences of security breaches and other unauthorized disclosures of private information, and shall indemnify and hold harmless CMHA from any legal claims or settlements arising from alleged breaches of tenant privacy and security.