

RFP 2023-1012;
Recertification Processing for Public Housing
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 all 4,158 units of the Public Housing Program. Related services may be utilized at an hourly fee. Asset Management (Public Housing) averages 300-400 recertifications per month. The recertifications will be divided among the number of contracts awarded. The contractors who demonstrate the greatest ability to meet the demands of the scope of work may receive a larger number of recertifications.

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 including updating family compositions 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), HUD 4250.3, 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
- 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

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documentation maintained of such communication must be placed in the resident's Yardi Memo and written correspondence placed in the electronic filing system (Currently OnBase). Training will be provided to contractors who are not familiar with these systems.

- 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 certifications (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 weekly report by 2:00 P.M. Friday of completed certifications (Annuals/Interims) and residents in non-compliance status. Contractor will also provide monthly, a list of residents who are being sent their "1st appointment letters" to demonstrate that residents are being processed beginning at 120 days.
- 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.

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- 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** Contractor agrees to participate in any Audits relating to activities listed within this scope of work.
- 1.20** 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 Pool of Contractors

- 2.1** CMHA intends to create a "pool" of Contractors to provide these Services. The Pool will consist of various Contractors which will be available on an as-needed basis to provide the services described in this Scope of Work. The actual number of Pool participants chosen will depend on the number of qualified proposals received.
- 2.2** Proposers selected to participate in the Pool will be assigned work at the discretion of CMHA based on quality of work, availability, manpower and timeliness and will serve in the Pool for a period of one (1) year with the option, at CMHA's sole discretion, to extend the contract for up to an additional four years for a maximum total of five years. CMHA will attempt to match each assignment to the Pool Participant best suited for a given task. CMHA will also determine the number of assignments any contractor will be assigned at any given time or duration. Selection as a participant of the Pool is not a guaranty of the type or number of tasks for which a participant may be selected. Time is of the essence with regard to Pool Participants' availability for and performance of the assignments.
- 2.3** If a Pool Participant is selected to perform one or more work assignments, CMHA will formally request the Pool Participant to perform such services by executing a purchase order. The Contractor will be notified by CMHA when services are needed. CMHA will provide the scope of work to the contractor before work is to begin. Once the Contractor is notified, the work will be scheduled with CMHA. The services will be completed as scheduled including completing a punch list and

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final inspection. The purchase orders may be issued at any time during the term of the Pool Agreement and the assignment of work projects will be made solely at the discretion of CMHA.

3.0 COVID-19 Requirements for Work

Vendors entering CMHA-occupied units must wear PPE (if requested by the resident, if not vaccinated, and/or per CDC guidelines), including but not limited to a mask that covers their mouth and nose. The mask should be worn throughout the entire period of service delivery.

Contractor is to practice social distancing while on site. In addition, Contractor personnel shall be neat and wear uniforms with the company name and an ID badge. This standard of neatness means Contractor staff must appear at the job site in freshly laundered clothing.

CMHA will issue badges to individual Contractor employees with their picture.

4.0 Performance Standards

- 4.1 20% deduction for failure to completed certifications timely and/or provide the required 30 day notice of rent change.
- 4.2 10% deduction for failure to encrypt communications and files submissions with resident data.
- 4.3 20% deduction for failure to ensure that the rent calculation and continued housing determinations are accurate and have the required supporting documentation.
- 4.4 10% deduction for failure to provide updates on the weekly reports
- 4.5 15% deduction for failure to aggressively pursue individuals that are non-responsive.
- 4.6 15% for failure to respond to resident concerns within 48 business hours.
- 4.7 Contractor will ensure ability to perform all services awarded. A Contractor claiming inability to perform a service due to insufficient staffing is not acceptable. If Contractor is unable to do the work for which they submitted a quote/proposal, the Contractor's contract for that work will be cancelled in whole or that part of the contract will be inactivated and no longer considered for award.
- 4.8 In the event of a schedule conflict, vendors will service CMHA first. Failure to do so will result in the vendor being sent a Notice to Cure to complete the service. If the vendor does not complete the service within the date specified on the Notice, another vendor may be contacted to perform the service. Per Section 2.4 of the General Terms and Conditions, three warnings (Notices) will result in vendor termination. (This situation is avoidable by arranging a schedule with the Property Manager for services.)
- 4.9 Invoices are to be submitted 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:

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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)

4.10 CMHA may waive the fee reductions at their 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.

5.0 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 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 that the contractor will also adhere to these standards.

6.0 Contract Terms

6.1 Contract Term

6.1.1 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.



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6.2 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.

6.2.1 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: \$200,000 annually. CMHA reserves the right to adjust these amounts, if in its best interest to do so, prior to contract approval.

7.0 CONFLICT OF INTEREST

7.1 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.