

RFP 2023-5006;
STRATEGIC PLAN CONSULTANT
ATTACHMENT A: SCOPE OF WORK



The Cincinnati Metropolitan Housing Authority (CMHA) seeks a consultant to develop a five-year comprehensive, sustainable, strategic plan for the agency. Specifically, CMHA expects a strategic plan that includes goals and measurable outcomes to meet community and CMHA needs for the next five years. This plan will examine our community's growth patterns and demographics, and identify the need for quality affordable housing throughout Hamilton County.

1.0 Background and Purpose: The overall goal of this project is to complete a strategic plan within appropriate timeframes set forth by CMHA. It is intended for the project to involve a significant amount of public and partner agency participation.

As part of public participation in the planning process, it is expected that various stakeholders, CMHA's Board of Commissioners, CMHA Employees, residents of CMHA's Affordable Housing portfolio, the City of Cincinnati, and Hamilton County Commissioners will provide critical information that will lead to the success of the preservation and creation of current and new affordable housing. The Strategic Plan will:

- 1.1 Establish and solidify agency goals and measurable outcomes through a five-year comprehensive plan;
- 1.2 Align the Strategic Plan to CMHA's Five Year Annual Plan;
- 1.3 Provide quality affordable housing that meets the ever-changing needs of Hamilton County constituents in a cost-effective manner;
- 1.4 Educate and bring awareness to community stakeholders with regards to our mission, vision and guiding principles.

2.0 Services to be Provided: The Cincinnati Metropolitan Housing Authority is seeking a professional Strategic Planning Consultant that will:

- 2.1 Facilitate the strategic planning process using a methodology effective for quality affordable housing;
- 2.2 Gather data to be presented in the strategic plan that identifies local needs over the next five-year period, which will include:
 - 2.2.1 Meetings
 - 2.2.1.1 Kickoff meeting and ongoing meetings with the Chief Executive Officer. Initial meeting should include a discussion of roles and responsibilities of the consultant, the work to be completed, and the projected timetable/schedule for completion;
 - 2.2.1.2 One Zoom meeting with executive staff
 - 2.2.1.3 Two Zoom meetings with employees in groups of approximately 40 for each meeting
 - 2.2.1.4 Three Zoom meetings with CMHA Board of Commissioners to discuss the progress on the strategic plan development and solicit input.
 - 2.2.1.5 Host Three Zoom/in person community charrettes for community stakeholders.

RFP 2023-5006;
STRATEGIC PLAN CONSULTANT



- 2.2.2 SWOT (Strength, Weakness, Opportunity, Threat) analysis
- 2.2.3 Develop questionnaires/surveys and utilize information obtained from
 - 2.2.3.1 CMHA’s Board of Commissioners
 - 2.2.3.2 Hamilton County Commissioners
 - 2.2.3.3 City of Cincinnati Mayor, City Manager and City Council
 - 2.2.3.4 Survey all of the municipalities in Hamilton County (See https://www.hamiltoncountyohio.gov/about/about_hamilton_county/jurisdictions)
- 2.3 Facilitate meetings of the planning committee(s) and public input sessions;
- 2.4 Assist in the identification of service priorities, goals, objectives and activities;
- 3.0 **General Requirements:** Activities related to the proposed strategic plan should include but not be limited to the following:
 - 3.1 Assist with the development of the stakeholder list identifying individuals and groups that should have input;
 - 3.2 Review and analyze existing data provided by CMHA;
 - 3.3 Assist the Cincinnati Metropolitan Housing Authority board with reviewing the mission and vision statements that reflect the current and future goals of the Authority;
 - 3.4 Assist CMHA staff in reviewing CMHA’s Gold Standard performance measures to ensure they reflect the current and future goals of CMHA;
 - 3.5 Assist CMHA in identifying new revenue generating streams that will allow CMHA to expand its preservation and development operations as it pertains to creating additional affordable housing in and outside of Hamilton County;
 - 3.6 Review and consider CMHA’s current and past strategic plans, CMHA’s annual plan, and the City and County’s annual plans to ensure CMHA’s future goals coincide with the previous stated plans; and
 - 3.7 Identify strategies to build organizational capacity for addressing community needs
- 4.0 **Additional Items to Review** - The selected consultant will review and take into account the following information in development of the strategic plan:
 - 4.1 An assessment of facilities, services, technology, and operations;
 - 4.2 Financial resources and sustainability;
 - 4.3 Collaboration with other community partners;
 - 4.4 Information relating to current use and projecting future demand as affected by the Community needs and the opportunities they offer;
 - 4.5 Future trends in technology;
 - 4.6 Trends affecting the future of affordable housing authorities in general;
 - 4.7 Information regarding community organizations that either supplement or complement affordable housing services; and
 - 4.8 Existing policies and operational practices.

**RFP 2023-5006;
STRATEGIC PLAN CONSULTANT**



5.0 Deliverables

- 5.1 Consultant shall provide a strategic plan ready to present to the community in both Power Point and booklet forms.
- 5.2 Deliverables will be in editable form.
- 5.3 Monthly update progress report to be submitted to Chief Executive Officer by the 23rd of each month.
- 5.4 Initial draft to be provided to the Chief Executive Officer no later than December 15, 2023.
- 5.5 All 10 required meetings to be completed by November 15, 2023.
- 5.6 Final draft shall be submitted to Chief Executive Officer no later than January 31, 2024.

6.0 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.

7.0 Performance Standards

- 7.1 Failure to complete the strategic plan and the step-by-step implementation plan within the required timelines will result in a penalty of \$25 per day in which the service is not completed unless a contingency exists in which case written authorization of the CEO is provided before the due date.
- 7.2 Information in a memo format and power point presentations should be professionally written, free of grammar and spelling errors. Content should be easy for the intended audience to understand. Failure to present a work product that conforms to these standards will result in a penalty of \$25 per day in which the service is not completed unless a contingency exists in which case written authorization of the CEO is provided before the due date.
- 7.3 Strategic plan booklet shall be formatted as a step-by-step guide on a per year basis (ex: Year 1 Section, Year 2 Section, etc.). Failure to present a work product that conforms to these standards will result in a penalty of \$25 per day in which the service is not completed unless a contingency exists in which case written authorization of the CEO is provided before the due date.
- 7.4 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:

Number of days to submit invoice to CMHA after completion of work or receipt	Performance Deduction from Invoice
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**RFP 2023-5006;
STRATEGIC PLAN CONSULTANT**



by CMHA in Yardi (whichever is later)	
<30	0%
>30	30%
>60	50%
>90	75%
>120	100% (No payment)

7.5 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.

8.0 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:

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|------------------|-------------------|-----------------------|------------------------|
| <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.

9.0 Contract Terms

9.1 Contract Term

9.1.1 The Authority intends to enter into a one-year contract with the successful offeror(s) selected to provide the services.

9.2 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.

9.2.1 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



**RFP 2023-5006;
STRATEGIC PLAN CONSULTANT**

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: \$35,000. CMHA reserves the right to adjust these amounts, if in its best interest to do so, prior to contract approval.