

REQUEST FOR PROPOSALS (RFP) NO. 2023-5007

CINCINNATI METROPOLITAN HOUSING AUTHORITY

SOLICITATION NUMBER 2023-5007

REQUEST FOR PROPOSALS

FOR

Contract Labor and Executive Search Services

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| DATE ISSUED | 8/8/23 |
| NON-MANDATORY PRE-PROPOSAL CONFERENCE | <p>A Zoom Pre-Proposal meeting is scheduled for 11:00 AM on Wednesday, August 16, 2023. The call will be to briefly discuss how to respond to this RFP and to answer any contractor questions.</p> <p>The Link to the call is https://cintimha.zoom.us/j/89032887752?pwd=c0hCRHhldS9SdEtDd1cyQ2hzaXRMQT09</p> |
| SITE VISIT/WALK THROUGH | Not Applicable |
| LAST DATE FOR QUESTIONS | Questions shall be submitted in writing no later than 11:00 AM local time on August 17, 2023 , to procurement@cintimha.com . Responses to questions will be posted as an addendum to the website along with the other solicitation documents. |
| NOTICE OF INTENT TO SUBMIT | It is suggested that interested companies submit a Notice of Intent to submit a proposal to procurement@cintimha.com . By indicating your intent to submit a proposal you will receive notice of any addenda posted. |
| PROPOSAL SUBMITTAL RETURN & DEADLINE | <u>September 5, 2023, no later than 11:00 AM</u> local time to Procurement@cintimha.com |
| WHAT TO SUBMIT | Submit: 1 electronic proposal; 1 electronic fee information form; 1 electronic contract award and acceptance form, and 1 electronic copy of the Section 3 forms. The 4 electronic files will be separate files. The 4 electronic files will be in .pdf format. Photographs and links to files will not be accepted. |

CMHA Reserves the right to modify this schedule at its discretion. Notification of changes will be made available to all interested parties via an email and/or by posting on CMHA's website.

THE RESPONSIBILITY FOR SUBMITTING A RESPONSE TO THIS REQUEST AT THE DESIGNATED OFFICE OF CINCINNATI METROPOLITAN HOUSING AUTHORITY ON OR BEFORE THE STATED TIME AND DATE WILL BE SOLELY AND STRICTLY THE RESPONSIBILITY OF THE PROPOSER. THE AUTHORITY WILL IN NO WAY BE RESPONSIBLE FOR DELAYS CAUSED BY THE DELIVERY MANNER CHOSEN BY THE RESPONDENT OR CAUSED BY ANY OTHER OCCURRENCE.

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INTRODUCTION

The Cincinnati Metropolitan Housing Authority (hereinafter, “CMHA” or “the Authority”) is a public entity that was formed in 1933 to provide federally subsidized housing and housing assistance to low-income families, within Hamilton County, Ohio. The Authority is headed by a Chief Executive Officer (CEO) and is governed by a seven-person board of commissioners and is subject to the requirements of Title 24 and Title 2 of the Code of Federal Regulations (hereinafter, “CFR”) and the Authority’s procurement policy. The Authority currently has approximately 205 employees, owns and/or manages over 5000 affordable housing units, and administers rental assistance for almost 12,000 privately owned rental units through the Section 8 HCV programs.

CMHA has several instrumentalities and related entities which develop and operate affordable housing in Hamilton County, Ohio. Those instrumentalities and related entities are included in this solicitation. As new developments and RAD conversions occur, additional instrumentalities will be created.

CMHA is seeking Contractors to provide Contract Labor and Executive Search Services on an as-needed basis. See Attachment A-Scope of Work for details.

In keeping with its mandate to provide efficient and effective services, the Authority is now soliciting proposals from qualified, licensed and insured entities to provide the services described in the Scope of Work to the Authority. 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.

Attachments: It is the responsibility of each proposer to verify that he/she has downloaded the following attachments pertaining to this RFP, which are hereby by reference included as a part of this RFP:

| Attachment/Section | Description |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A | Reference* Scope of Work |
| B | Separate Electronic File Fee Submission Form |
| C | Reference* General Terms and Conditions including the Form HUD-5370-C1, <i>General Conditions for Non-Construction Contracts Section I (With or without Maintenance Work) and Section II (with Maintenance Work)</i> |
| D | Section 2 Section 3 Forms |
| E | Separate Electronic File Contract Award and Acceptance Form. Include with the Fee Submission Form. |
| F | Reference* The Authority’s Instructions to Proposers (ITP) |
| G | Section 1 Form of Proposal |
| H | Section 1 HUD Form Packet |
| I | Section 4 Professional References |
| J | Separate Electronic File Vendor Registration Form (if not previously submitted or if updating) |

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| | or via email | If the proposer has not previously registered as a vendor with CMHA or if any information has changed, then the Vendor Registration Form (<i>Attachment J</i>) must be fully executed and submitted as part of the proposal submittal or prior to the submittal. If selected for award, these forms are required in order to process purchase orders for payment. |
| K | Section 4 | Areas of Service |

*Do not include the reference attachments in your proposal.

1.0 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 that 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 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.

2.0 ECONOMIC INCLUSION PARTICIPATION

The Authority has, within the terms of its procurement policy, established the following goals with regards to Economic Inclusion and encourages participation by MBE/WBE and Section 3 Business concerns.

- Minority-Owned Business Enterprise:
 - General Construction: 20%
 - Professional Services: 12%
 - Material/Supplies: 5%

- Women-Owned Business Enterprise goal 5%

- Section 3: meet or exceed applicable benchmarks set by HUD

In furtherance of Section 3 initiatives, any hiring or training opportunities that are generated through this contract agreement should be provided to Section 3 Business Concerns or Section 3 Workers to the greatest extent feasible.

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Within Section 2 of the proposal, the proposer must complete and submit *Attachment D*, Section 3 forms and any applicable MBE/WBE/SBA certification.

3.0 PROPOSAL FORMAT

3.1 Proposal Submittal: The Authority intends to retain the successful proposer pursuant to a “Best Value” basis, not a “Low Proposal” basis ("Best Value," in that the Authority will, as detailed within the following Section 4.0, consider factors other than just cost in making the award decision). Therefore, so that the Authority can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted following. Each category must be separated by numbered dividers and labeled with the corresponding section reference also noted below. Separate electronic files may be utilized (and labeled) for each Section. None of the proposed services may conflict with any requirement the Authority has published herein or has issued by addendum

| Section | Form | Description |
|----------------|-----------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Form of Proposal: <u>Attachment G</u> | This 1-page Form must be fully completed, executed where provided thereon and submitted under this section as a part of the proposal submittal. |
| 1 | HUD Form Packet: <u>Attachment H</u> | The following forms must be fully completed, executed where provided thereon and submitted under this section as a part of the proposal submittal: <ul style="list-style-type: none"> • Form HUD 5369-C <i>Certifications and Representations of Proposers, Non-Construction Contract</i> • Form HUD 2922 <i>Certification Regarding Debarment and Suspension</i> • Form HUD 50071 <i>Certification of Payments to Influence Federal Transactions</i> • Standard Form LLL <i>Disclosure Form to Report Lobbying (if required per HUD 50071)</i> |
| 2 | Section 3 Business Preference Documentation: <u>Attachment D</u> | Within Section 2, the proposer must complete and submit <i>Attachment D</i> , Section 3 forms and any applicable MBE/WBE/SBA certification. |
| 3 | Proof of Insurance and Licensing | The proposer must provide current proof of insurance and licensing requirements. See Section 12 of the General Terms and Conditions (<i>Attachment C</i>). The proposer shall provide the following certificates evidencing the coverage amounts : <ul style="list-style-type: none"> • Workers Compensation & Employer’s Liability • General Liability • Automobile |

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| | | <ul style="list-style-type: none"> • Professional Liability and/or Errors and Omissions • Registration with the State of Ohio and/or City of Cincinnati • If licensing is required for the service, include applicable licenses |
| 4 | Technical Proposal | |
| 4a | Letter of Interest | The Offeror must provide a letter of interest listing the firm or individual primary contact person, signed by the authorized principal, and a statement that the proposal will remain valid for not less than one hundred and twenty days (120) from the due date. |
| | Attachment K | Areas of Service Offered (the areas of service marked should match Attachment B – Fee Submission Form but no fees may be contained in this section) |
| 4b | Experience and Qualifications | A consideration in awarding a contract is the experience and services of the firm and personnel of the firm who will be conducting and administering the services. Each Offeror must furnish a brief history of the company, indicating how long it has been in business providing services of similar scope and complexity as those requested in this RFP. The Offeror should clearly indicate which key personnel will be assigned to the project and include appropriate biographical information for each person who will be assigned to work on the project. The biographical information should list specializations, specific contributions and responsibilities indicating individual experience, particularly all work of similar scope and complexity performed for other public housing authorities. Include Attachment I – Professional References in this section. |
| | Professional References <u>Attachment I</u> | <p>The proposer shall submit a listing of 5 former or current professional references for which the proposer has performed similar or like services to those being proposed herein within the past year. You <u>must</u> reference any previous work performance for the Authority; however, CMHA should not be listed as more than one of your references. It is reasonable to assume the Authority will contact references. The listing shall, at a minimum, include:</p> <ul style="list-style-type: none"> • The client’s name, • The client’s contact name, • The client’s address, • The client’s telephone number and email address, |

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| | | <ul style="list-style-type: none"> The Client’s Business Name (if applicable), and A brief description and scope of the service(s) and the dates the services were provided. <p>Do not use family members as references.</p> |
| 4c | <p align="center">Completeness of Proposal/ Grasp of Expectations/ Capacity</p> | <p>The Completeness of Proposal and Demonstrated Grasp of Performance Expectations/Capacity of the Company of services to be performed under the Scope of Work.</p> <p>CONTRACT LABOR SERVICES PROPOSERS ONLY:</p> <ul style="list-style-type: none"> Provide an estimate of the turnaround time for an assignment from request to fulfillment. Indicate your policy on addressing situations where CMHA deems an assigned employee to be unacceptable. Indicate your policy concerning lunch breaks and accommodations for religious practices, for assigned temporary employees. Contractor’s policy shall be flexible to follow the CMHA policies about this topic. Indicate the size of your general clerical, maintenance, and specialty resource pools. <p>EXECUTIVE SEARCH PROPOSERS ONLY:</p> <p>Capacity: Each proposal shall contain a statement of availability to meet such Offerors proposed project schedule of the services to be provided. Upon request, each Offeror shall submit evidence of compliance with all requirements including any required licenses, insurance, HUD forms, and statements that Offerors, their staff and agents shall comply with all laws, ordinances and regulations applicable to the services specified herein, especially those applicable to conflict of interest. Offerors are presumed to be familiar with, and shall assume all responsibility for complying with, all federal, state and local laws, ordinances, codes, rules and regulations that may in any way affect the service to be provided. Please include with your proposal a list of cities, counties, public organizations, housing authorities, etc. whom your company has worked with during the last three (3) years. It is not anticipated that the selected Offeror will be permitted to subcontract any part of the work to be performed. CMHA reserves the right, in its sole and absolute discretion, to refuse to permit any portion of the work to be subcontracted. Attachment I should be utilized for this.</p> |
| 4d | <p align="center">Quality Plan/ Recruiting Plan</p> | <p>Describe your plan or procedure to monitor employees and subcontractor performance if awarded a contract.</p> <ul style="list-style-type: none"> Provide a sample copy of the Quality Control |

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| | | <p>Evaluation form used to measure your employee’s performance while on assignment at CMHA. Include your firm’s policy and timelines regarding issuance of these forms.</p> <ul style="list-style-type: none"> • Recruiting Plan- <u>Executive Search Proposers only.</u> Each Offeror must provide a recruiting plan outlining <u>their strategy and associated timelines for the recruitment of these positions.</u> Details such as starting dates, anticipate methodology and delivery dates should <u>clearly be outlined.</u> |
| 4e | <p>Managerial Capacity/ Financial Viability/ <u>Methodology for Establishing Fees (Executive Search Proposers Only)</u></p> | <p>Managerial Capacity/Financial Viability/Methodology for Establishing Fees: The proposer entity must submit a concise description of its managerial and financial capacity to deliver the proposed services.</p> <ul style="list-style-type: none"> • Provide the names and telephone numbers of persons directly responsible for providing the services on a day-to-day basis including brief professional resumes • Provide a brief general overview of the firm/individuals overall capabilities, history and background including when established, organizational structure, names of general partners, main and branch office locations, etc. • Provide or detail the specialized services available through your firm and indicate any NOT available. • Indicate your firm’s ability to respond to requests for assistance following short notice and within abbreviated timelines and to provide the requested personnel the same day the request is received. • Explain your firm’s service guarantee for direct placement of individuals if they should involuntarily and/or voluntarily leave within twelve (12) months of their start date with CMHA. • <u>Methodology for Establishing Fees (Executive Search Proposers Only)</u> - See Attachment A, Section 1.2.2. Provide methodology for establishing fees. |
| 5 | <p>Equal Employment Opportunity</p> | <p>The proposer must submit under this Section a copy of its Equal Opportunity Employment Policy.</p> |
| 6 | <p>Subcontractor/Joint Venture Information (If Applicable):</p> | <p>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 Sections must also be included for any major subcontractors (10% or more) or from any joint venture. At a minimum, the following forms must be submitted for the</p> |

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| | | subcontractor: <ul style="list-style-type: none">• HUD Packet of forms• Profile of Firm Form• Section 3 forms• Licensing and Insurance Label forms clearly to indicate whether they are for the contractor or subcontractor. |
| 7 | Other Information (Optional) | The proposer may include hereunder any other general information that the proposer believes is appropriate to assist CMHA in its evaluation. |

3.1.1 If no information is to be placed under any of the above noted Sections (especially the “Optional”), please place thereunder a statement such as “THIS SECTION LEFT INTENTIONALLY BLANK.” DO NOT eliminate any of the sections.

3.2 Proposal Submission: All proposals must be emailed and time-stamped **received** in the designated the Authority office by no later than the submittal deadline stated herein (or within any ensuing addendum). A total of 1 original signed proposal which may consist of one or several files, along with the fee information in a separate file, and the executed Contract Award and Acceptance in a separate file addressed to

Cincinnati Metropolitan Housing Authority
procurement@cintimha.com

The electronic copy should include at least four files: one (or more) for the proposal, one for the fee information, one for the Contract Award and Acceptance, and one for the Section 3 documents. However, the proposal may be in more than one electronic file. The subject line of the cover email(s) must clearly denote the RFP number and the body of the email must have the proposer’s name. Proposals **received** after the published deadline will not be accepted.

4.0 PROPOSAL EVALUATION:

Each Proposal submittal will be evaluated based upon the following information and criteria.

4.1 Evaluation Criteria: The evaluation panel will use both objective and subjective criteria 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.

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| NO | POINTS | WEIGHTED AVERAGE | DESCRIPTION |
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| 1 | 0-5 | 25% | The Proposed Fees to provide the services required |
| 2 | 0-5 | 15% | Experience and Qualifications |
| 3 | 0-5 | 15% | Completeness of Proposal/Grasp of Expectations/Capacity |
| 4 | 0-5 | 10% | Quality Plan/Recruiting Plan |
| 5 | 0-5 | 10% | Managerial Capacity/Financial Viability/Methodology for Establishing Fees |
| 6 | 0-5 | 5% | <p>Gold Performance Standards The Proposer’s clear demonstration and understanding of THE AUTHORITY’S MOTTO and GOLD PERFORMANCE STANDARDS through the firm’s proposal as a direct reflection of the type of product the Authority may expect from the proposer.</p> <ul style="list-style-type: none"> • Legible and readable • No spelling or grammar errors • All required information is provided • Information is in correct sequence • Overall Presentation |
| | | 80% | Sub-Total Points (Other than Preference Points) |

4.1.1 Interview: Those Contractors with scores closest to 80% in categories one through five may be asked to participate in the second stage, consisting of the seventh factor: Any and all interviews are at the sole discretion of the Authority.

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| 7 | 0-5 | 10% | Appear and Participate in an <u>Interview with the Authority</u> to discuss qualifications and proposal. Scores assigned for proposals, under any category, may be amended based on information obtained during the oral interviews. |
| | | 90% | Total Points (other than preference points) |

4.1.2 Additional Evaluation Factors: The following factors will be utilized by the PO to evaluate Economic Inclusion Points for each proposal received. It is important to note that the Economic Inclusion Points are not a requirement of this solicitation, but are simply additional points available to the proposers. No proposal will be rejected for not receiving any additional points.

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| NO. | MAX POINT VALUE | FACTOR TYPE | FACTOR DESCRIPTION |
|------------|------------------------|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8 | | Objective | Economic Inclusion Participation: A firm may qualify for Section 3 status as detailed within <u>Attachment D</u> and may qualify as a DBE/MBE/WBE and SBE as certified by the City of Cincinnati, the State of Ohio MBE/WBE registration board and/or any other governmental certification entity. |
| | 10 points | | Demonstrative Section 3 Action Plan |
| | 100 | Total Possible Points | |

4.2 Minimum Evaluation Results: To be considered to receive an award a proposer must receive a total calculated average of at least 65 points (of the total possible points detailed above).