

RFP 2023-1032;
WORK ORDER ANSWERING SERVICES
ATTACHMENT A: SCOPE OF WORK



1.0 After Hours Answering and Maintenance Dispatch Services for Asset Management

General details:

- The number of monthly calls vary depending on the season (for example, summer air conditioner and winter heater calls increase during those seasons). The number of daily calls is higher on Fridays, Saturdays, and holidays.
- An estimated 2500 to 3,000 work order calls are received per month. These include calling the work order center and after hours answering service. There are no work orders generated through the Rent Café portal at this time. An estimated 5 calls per night and 30 calls per weekend are considered emergencies.
- The average length of a call is 3-5 minutes. Calls should be answered within the third ring. Average hold time must be less than 2 minutes.
- Contractor may be asked to enter and close work orders in the Yardi Property Management System.
- Contactor must have the ability to complete short customer services surveys, as needed
- Contractor must have the ability to assist CMHA staff in communicating with residents relating to emergency work orders. Management will respond back to emergency email with the requested communication.
- CMHA will provide the necessary training materials such as on-call, property listings, recognized emergency listing, protocol for staff calling, and the holiday schedule but the Contractor(s) should have the ability to provide services the day the contract starts.
- There is no required total call capacity or simultaneous inbound call capacity.
- 100% of calls should be answered by a live operator.
- There is no minimum or maximum requirement for number of staff assigned to work under this contract and no required degree of dedication. Contractor is to perform work off-site.

1.1 Minimum Contractor(s) Qualifications: Contractor(s) selected shall be an established company with not less than five (5) years in business and five (5) years of experience in providing Telephone Answering and Message Services similar to the requirements identified herein.

1.1.1 Contractor(s) shall comply with all applicable federal, state and local laws, rules, regulations, ordinances and codes and obtain any licenses or permits required to provide the services under this solicitation.

1.1.2 Contractor(s) shall furnish at their own expense, all labor, tools, equipment including but not limited to equipment required to have telephone, fax, email, and text capabilities, materials, and supplies, required to provide answering service tasks/functions for each Asset Management Property (AMP), as specified herein with no exceptions.

1.1.3 Contractor(s) shall pay all of its employees, including any and all approved sub-Contractor(s), at least the legal minimum wages as determined by the United States Department of Labor

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and the United States Department of Housing and Urban Development.

- 1.1.4** Contractor(s)'s personnel shall conduct all work in a professional manner, even when dealing with residents, staff or other callers in high stress situations.
- 1.1.5** Contractor(s) shall replace any employee deemed unacceptable by the Authority, within two (2) business days.
- 1.1.6** The Contractor(s) receiving an award may be required to attend meetings in Cincinnati with Property Management, at no additional cost to the Authority.
- 1.1.7** All work must be done within the continental United States. All firms are invited to submit a response regardless of their country of origin, however, the call center and the operators handling the calls must be physically located within the continental United States.

1.2 Telephone Answering and Message Services

- 1.2.1** Contractor(s) to provide telephone answering and message services on a daily basis with weekends and holidays included. This may include office closures such as company events, inclement weather, etc. Services will be required 365 days per year.
- 1.2.2** Contractor(s) must prepare a daily, detailed spreadsheet of messages and forward to the Authority, by no later than 7:30 a.m. on the morning following a daily message period. All reports shall be sent via email.
- 1.2.3** Contractor(s) shall have sufficient properly trained, experienced and dependable staff to meet the contract needs in a timely and technically acceptable manner.
- 1.2.4** Contractor(s)'s personnel shall conduct all work in a professional manner, even when dealing with residents, staff or other callers in high stress situations.
- 1.2.5** Contractor(s) shall provide qualified Bilingual English/Spanish operators, at all times, to perform the work required of this QSP and any resulting contract.
- 1.2.6** Contractor(s) shall maintain the ability to provide service to hearing impaired clients.
- 1.2.7** All incoming calls shall be answered by the third ring.
- 1.2.8** Contractor(s) shall answer calls with the following phrase: "Thank you for calling Cincinnati Metropolitan Housing Authority. This is the Answering Service. How may I be of assistance?"
- 1.2.9** Contractor(s) shall record the following from each caller:
 - Tenant's name
 - Caller's name (if different than Tenant)
 - Caller's phone number
 - Development

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- Caller's unit number and/or address
 - Location within unit, i.e. bedroom, living room, etc.
 - Caller's concern(s) or inquiry (Provide specific details including description of problem and location)
- 1.2.10** All messages on the spreadsheet report must be clear and concise to the satisfaction of the Authority. There shall be no need for clarification or interpretation on the message content.
- 1.2.11** Reports of dispatch calls shall clearly indicate all calls made for dispatch to personnel and clearly indicate the successful delivery of the dispatch, the time of the delivery of the dispatch message, and the name of the individual contacted. If more than one dispatch call is required, the report shall list the time and status of each call.
- 1.2.12** All calls shall be recorded and available to the Authority upon request at no additional cost. All calls must be held for 5 years in accordance with CMHA's document retention policy.
- 1.2.13** Contractor(s) shall provide the Authority with a monthly activity/invoicing report for each Asset Management Property (AMP). The spreadsheet shall contain at a minimum, the following information:
- List of AMPs
 - Number of calls per AMP
 - Number of e-mails per AMP
 - Additional information for inclusion in report may be requested by the Authority.
- 1.2.14** Contractor(s) shall inform the Authority within two (2) working days of any change in contact information, including but not limited to contact personnel, mailing addresses, physical address, phone numbers and email addresses.
- 1.2.15** Contractor(s) shall have sufficient financial resources to successfully provide the scope of services identified herein, including the identified permissible billing frequency.
- 1.2.16** If the situation is not an emergency, the Contractor(s) shall include the call on a separate report for Non-Emergency Calls. If requested, the contractor will create a routine work order in Yardi.
- 1.2.17** The Authority will provide the Contractor(s) an On-Call Supervisor schedule. Schedule shall be provided to the Contractor(s) 48 hours prior to the next month. Contractor(s) will accept changes to the On-Call Supervisor schedule via e-mail from the Authority.
- 1.2.18** Selected Contractor(s) must have everything in place to start providing services.

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Emergency Maintenance Request

- 1) Residents must call CMHA's Work Order Center request line at (513) 381-2642. They are given an option to leave a message for none emergency work or to be connected to the answering service for emergency issues.
- 2) The answering service will ask the following information of the caller:
 - a. Tenant's name
 - b. Caller's name (if different than Tenant)
 - c. Caller's phone number
 - d. Development
 - e. Caller's unit number and/or address
 - f. Location within unit, i.e. bedroom, living room, etc.
 - g. Caller's concern(s) or inquiry (Provide specific details including description of problem and location)
 - h. Verify that the resident is at home and must be there when maintenance arrives
 - i. In the event of a lockout, the call must be asked for the last four digits of their social security number for verification purpose.
- 3) The answering service representative will compare the caller's concern to the recognized emergency list.
 - a. If the maintenance concern **is not listed** on the recognized emergency sheet, the answering service will document the non-emergency maintenance item on their daily report so that it can be entered into the Elite Module by the work order center during the next business day. No staff should be dispatched.
 - i. The Non-Emergency Daily Report will be emailed to the work order /Asst. Director Asset Management center by 8:30am each morning.
 - b. If the maintenance concern is listed on the recognized emergency sheet, the vendor will dispatch the maintenance staff.
 - i. The Emergency Daily Report will be emailed to the work order center by 8:30am each morning.
- 4) Reports of dispatch calls shall clearly indicate all calls made for dispatch to on-call personnel and clearly indicate the successful delivery of the dispatch, the time of the delivery of the dispatch message, and the name of the individual contacted.

Dispatching Maintenance Staff

- 1) The Maintenance Superintendent or their designee will provide the answering service with a list of CMHA address list along with the Call Back Maintenance Crews coverage areas,

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the Maintenance/Supervisory Call Back Schedule for the year with their CMHA issued cell phone numbers and email addresses.

- 2) Upon receiving the emergency maintenance concern, the answering service representative will refer to the CMHA list and to identify the supervisor responsible for callback coverage. They will then place a telephone call to the supervisor responsible for that unit.
- 3) The answering service will relay all information verbally to supervisor and follow up with an email.
 - a. If supervisor fails to respond to the first call, the answering service will wait 5 minutes and call again for a second notification
 - b. If supervisor fails to respond to the second call, the answering service will immediately contact the Maintenance Superintendent.
 - c. If Maintenance Superintendent fails to respond to call, the answering service will contact the Lead Maintenance Supervisor.
 - d. If unable to reach the Assistant Director of Asset Management, the answering service will contact the Director of Asset Management
- 4) The answering service will provide caller's name, telephone number and the nature of the emergency. Upon receiving the notification from the answering service, Supervisor will contact the resident directly within ten (10) minutes of receiving the call. This call is to acknowledge that it has reached a CMHA representative, to determine the true nature of the emergency and to determine whether or not maintenance staff should be dispatched.

1.3 Hours

1.3.1 Normal work hours for the Authority are from 8:00 – 4:30 p.m. Monday through Friday, except holidays. Transfer from the Authority to answering service will normally occur between 4:15 p.m. and 4:30 p.m., Monday through Friday. Transfer from answering service back to the Authority will occur between 7:45 a.m. and 8:00 a.m., Monday through Friday. There may be times when services will be required during the Authority's normal working hours. The contractor will provide bybackup to the CMHA staff. In the event, the staff cannot answer the telephone by the 4th ring, the call will be transferred to the contractor to answer and complete the work order generation.

1.3.2 The Authority holidays are as follows:

- New Year's Day
- Martin Luther King Jr. Day
- President's Day
- Good Friday
- Memorial Day
- Juneteenth

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- Independence Day
- Labor Day
- Columbus Day
- Veteran's Day
- Thanksgiving Day
- The day after Thanksgiving
- Christmas Eve/Day

1.3.3 Contractor(s) is required to answer all incoming calls during normal business hours when staff is out of the office.

1.3.4 There will be times that the Authority staff notifies the Contractor(s) they are forwarding calls. The Authority staff will provide the Contractor(s) with emergency cell numbers.

1.3.5 If there is no answer or the on-call supervisor fails to respond to the Contractor(s) calls within five (5) minutes, the Contractor(s) shall contact the manager of that property.

1.4 Emergency Determination

1.4.1 Contractor(s) shall determine if the call is a legitimate emergency. In addition, any call that suggests it could involve health, life, safety or imminent damage to property, will be considered an emergency. Staff answering calls shall ask questions of the caller to determine the true nature of the call, if it is not readily apparent.

1.4.2 Examples of emergency calls include, but are not limited to: Heating, air conditioning issues, plumbing issues, lockouts, power failures, broken water line, raw sewage (affecting more than one unit), elevator malfunctions, kicked in door, inoperable door/lock, smoke alarm/fire alarm, structural damage to exterior/interior of CMHA building, and inoperable refrigerator (weekend). A list of Recognized Emergencies will be provided.

1.4.3 If the call is regarding a legitimate emergency, the Contractor(s) shall verify the status of the emergency call to 911 emergency dispatch services. The answering service shall verify whether or not the caller has called 911. The answering service personnel shall make sound judgment decisions on a case basis to place a 911 call when circumstances warrant such action.

1.4.4 If the situation is an emergency

1.4.4.1 Contractor(s) will be provided with a list of staff members and contractors to provide emergency services. The contractor shall contact the appropriate maintenance staff member/contractor via cell phone. If the maintenance staff member/contractor does not respond within 10 minutes, Contractor(s) shall contact the On-call Supervisor by cell phone. A list of developments with the On-Call cell numbers will be provided to the Contractor(s). Contractor(s) shall continue up the call list for that property until contact is made, even if this requires escalation to the level of the Director.

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1.4.4.2 For calls received after hours, holidays or weekends, Contractor(s) shall e- mail no later than 8:00 a.m., on the next business day all information received from the previous shift. This shall include at a minimum, the name of the person contacted at the Authority to respond to the emergency situation, time and date of call, along with all detailed information regarding the call. This e-mail shall also include details of any problems or concerns that arose with the call, such as difficulty in making contact with the listed on-call staff for the property and steps that were taken to resolve the situation.

2.0 Pool of Contractors

- 2.2** 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.

- 2.3** 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.

- 2.4** 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 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 Performance Standards

- 3.1** The Contractor(s) shall be obligated to pay CMHA the sum of twenty-five and no/100 dollars (\$25.00) per day for each day that the Contractor(s) fails to submit the daily report.

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- 3.2 The Contractor must meet all performance indicators listed in the contract. Failure to do so may lead to a reduction of 20% of monthly invoice amount or contract termination.
- 3.3 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.
- 3.4 In the event of a schedule conflict, vendors will service CMHA and/or TPS 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.)
- 3.5 Failure to comply with all of the requirements in the resulting contract and/or the requirements in the purchase order may result in a reduction of the consultant's fee by 10% for that service
- 3.6 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 by CMHA in Yardi (whichever is later)	Performance Deduction from Invoice
<30	0%
>30	30%
>60	50%
>90	75%
>120	100% (No payment)

- 3.7 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.

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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 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.

5.0 Contract Terms

6.1 Contract Term

5.1.1 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.

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: \$30,000 annually. CMHA reserves the right to adjust these amounts, if in its best interest to do so, prior to contract approval.