

TOUCHSTONE PROPERTY SERVICES

SOLICITATION NUMBER TP23-5001

REQUEST FOR PROPOSALS

FOR

Audit and Tax Preparation Assistance

DATE ISSUED	<u>October 31, 2023</u>
NON-MANDATORY PRE-PROPOSAL CONFERENCE	Not applicable.
SITE VISIT/WALK THROUGH	Not Applicable
LAST DATE FOR QUESTIONS	Questions shall be submitted in writing no later than <u>11:00 AM</u> local time on <u>November 14, 2023</u> 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>November 17, 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; and 1 electronic contract award and acceptance form. The 3 electronic files will be separate files. The 3 electronic files will be in .pdf format. Photographs and links to files will not be accepted.

TPS 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 TOUCHSTONE PROPERTY SERVICES ON OR BEFORE THE STATED TIME AND DATE WILL BE SOLELY AND STRICTLY THE RESPONSIBILITY OF THE OFFEROR. TPS WILL IN NO WAY BE RESPONSIBLE FOR DELAYS CAUSED BY THE DELIVERY MANNER CHOSEN BY THE RESPONDENT OR CAUSED BY ANY OTHER OCCURRENCE.

INTRODUCTION

Touchstone Property Services, Inc. (TPS) hereby solicits and requests proposals from qualified contractors to provide Preventative Maintenance Plan preparation. This request is not an offer to buy and should not be assumed as such. The award will be made to the most responsive, responsible contractor(s) who submits the most technically acceptable proposal and meets the overall criteria.

Touchstone Property Services, Inc. is an instrumentality of the Cincinnati Metropolitan Housing Authority (CMHA or The Authority). CMHA is a metropolitan housing authority organized and existing under Ohio Revised Code §3735.27, et seq., and is governed by the U.S. Housing Act of 1937, as amended, and subject to regulations under Title 2 and Title 24 of the Code of Federal Regulations.

In keeping with its mandate to provide efficient and effective services, TPS is now soliciting proposals from qualified, licensed and insured entities to provide the above noted services to TPS. 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 Sections I Without Maintenance Work</i>
D	Omitted	
E	Separate Electronic File	Contract Award and Acceptance Form. Include with the Fee Submission Form.
F	Reference*	TPS’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 or via Separate Email	Vendor Registration Form (if not previously submitted or if updating) 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.

*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.

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:** TPS intends to retain the successful proposer pursuant to a “Best Value” basis, not a “Low Proposal” basis (“Best Value,” in that TPS will, as detailed within the following Section 4.0, consider factors other than just cost in making the award decision). Therefore, so that TPS can properly evaluate the offers received, all

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proposals submitted in response to this RFP must be formatted in accordance with the sequence noted following. Separate electronic files may be utilized (and labeled) for each section. None of the proposed services may conflict with any requirement TPS 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.
2	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 Offerors, 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>
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 • 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	Approach and Understanding of the Task	Include a transmittal letter describing the consultant’s interest, understanding and commitment to the proposed contract.
4b	Experience and Qualifications	Proposal must clearly demonstrate full knowledge, understanding, and experience in methods, techniques and guidelines required for the performance of the required work. All elements within this factor are of equal importance. Capacity and capability of the consultant to perform the work on schedule

		and be responsive to TPS’s direction should be clear. The proposer’s ability to form successful working relationships and to effectively communicate is of the essence.
	Professional References <u>Attachment I</u>	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 <i>must</i> reference any previous work performance for TPS; however, TPS should not be listed as more than one of your references. It is reasonable to assume TPS will contact references. The listing shall, at a minimum, include: <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, • The Client’s Business Name (if applicable), and A brief description and scope of the service(s) and the dates the services were provided. Do not use family members as references.
4c	Previous Client Satisfaction	A list of references should highlight at least three (3) recent projects of a similar nature, magnitude and complexity; projects must include telephone number and affiliation, as well as a brief explanation of referenced work. The consultant shall indicate the individuals on staff who had responsibility for each project and whether or not these people are still employed by the consultant. <u>Quality Plan:</u> Describe your plan or procedure to monitor employees to assure quality if awarded a contract
5	Equal Employment Opportunity	The proposer must submit under this section a copy of its Equal Opportunity Employment Policy.
6	Subcontractor/Joint Venture Information (If Applicable):	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 subcontractor: <ul style="list-style-type: none"> • Contractor’s business name, contact name, address, email address, phone number • HUD Packet of forms

		<ul style="list-style-type: none"> • Section 3 forms • Licensing and Insurance
7	Other Information (Optional)	The proposer may include hereunder any other general information that the proposer believes is appropriate to assist TPS 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: One electronic proposal shall emailed to, and be received by, TPS by the deadline. The electronic copy should include at least three files: one for the proposal, one for the fee information and one for Attachment E, Contract Acceptance and Award. However, the proposal may be in more than one electronic file. Proposals received after the published deadline will not be accepted. The subject line must clearly denote the RFP number and the email must have the proposer’s name

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.

NO	POINTS	WEIGHTED AVERAGE	DESCRIPTION
1	0-5	25%	The Proposed Fees to provide the services required
2	0-5	20%	Approach and Understanding of the Task
3	0-5	20%	Experience and Qualifications
4	0-5	20%	Previous Client Satisfaction
5	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

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			<ul style="list-style-type: none"> • All required information is provided • Information is in correct sequence • Overall Presentation
		90%	Sub-Total Points (Other than Interview Points)

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

6	0-5	10%	Appear and Participate in an <u>Interview with TPS</u> to discuss qualifications and proposal. Scores assigned for proposals, under any category, may be amended based on information obtained during the oral interviews.
		100%	Total Points (other than preference points)