

**RFP 2024-4001**  
**Development Consultants**  
**ATTACHMENT A: SCOPE OF WORK**



**1.0 SCOPE OF WORK (SOW)/TECHNICAL SPECIFICATIONS (T/S)**

CMHA is in the process of converting approximately 5,000 public housing units to the Rental Assistance Demonstration (RAD) program over the next 5-7 years. Anticipated RAD conversion will require varied levels of rehabilitation to current units as well as an opportunity for new construction. CMHA's portfolio of Public Housing units consists of approximately 5,000 units spread across 18 Asset Management Properties and includes 12 high rise buildings, 3 large multi-family sites and more than 1,300 scattered site units.

CMHA also intends on continued development of non-RAD affordable housing units for mixed income families, seniors, commercial/retail and other affordable housing options in Hamilton County and the City of Cincinnati over the next 5 years.

Internal staff cannot handle the workloads expected. Therefore, the Cincinnati Metropolitan Housing Authority (CMHA) seeks consultants to provide services as project management, RAD development and design management consultants.

**2.0 GENERAL REQUIREMENTS**

**2.1 Contractor Responsibilities**

**2.1.1** Contractor shall perform criminal history checks and drug screening tests on all prospective employees performing work under this RFP or coming onto a CMHA property and any resulting contract and provide summaries of the results to the Authority if requested. For the purposes of this section, the term "employees" includes contractor. Prospective employees whose criminal background check discloses a misdemeanor or felony involving crimes of moral turpitude, sexual offenses or harm to persons or property shall not be employed to perform work under this RFP or any resulting contract. Contractor is required to perform drug screening of all employees and to ensure acceptable test results. Criminal history and drug screening checks will be completed at the sole expense of the contractor. Any employee of the Contractor suspected of being under the influence of drugs and or alcohol will be reported to the Authority's Compliance and Safety Operations Department and/or other local law enforcement. If the employee is determined to be under the influence of drugs or alcohol in any form or manner, or believed by proper authority to be dealing in illicit sale of alcohol or drugs they will be removed and shall not be allowed to return to any job site on the Authority's property. The Contractor's contract may be suspended and/or terminated should such a situation occur or if the Contractor fails to submit results pursuant to this section.

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- 2.1.2 Contractor's personnel shall be neat and conduct all work in a professional and efficient manner. If any employee of Contractor is deemed unacceptable by CMHA, Contractor shall immediately replace such personnel with an acceptable substitute to CMHA.
- 2.1.3 The contractor and its employees shall at all times represent themselves in a courteous and professional manner. All posted driving and speed regulations shall be observed.
- 2.1.4 Contractor(s) shall practice acceptable safety precautions so as not to cause harm to any persons or property while performing services under this RFP or any resulting contract.
- 2.1.5 Contractor(s) shall pay all of its employees, including any and all approved Sub-Contractors, at least the legal minimum wages as determined by the United States Department of Labor and the United States Department of Housing and Urban Development and Department of Labor Prevailing Wage. Wage Determinations can be accessed via the Department of Labor website, [www.wdol.gov](http://www.wdol.gov).
- 2.1.6 Contractor(s) shall inform CMHA Procurement within two (2) working days of any change in contact information, including but not limited to contact personnel, mailing address, physical address, phone numbers and email addresses.
- 2.1.7 **Conservation of Utilities** – The Contractor shall practice utility conservation in all CMHA facilities. The Contractor shall be responsible for operating under conditions, which preclude the waste of utilities, which shall include:
  - Lights shall be used only in areas where and when work is actually being performed.
  - Water faucets or valves shall be turned off after the required usage has been accomplished.
  - Mechanical equipment controls for heating, ventilation, and air conditioning systems shall not be adjusted by the Contractor or by Contractor's employees.

**2.2 Design Manager Scope of Work**

*The below statements are intended to describe the general nature and scope of work being performed by these consultants. This is not a complete listing of all responsibilities, duties and/or skills required. Other relevant duties may be assigned.*

- Assist in the capital fund planning process to insure capital fund requirements are met.
- Assist in the development of plans and schedules to assist in new acquisitions and construction of new development projects using Replacement Housing Factor, mixed financing and other sources of funding.
- Participate in the physical and capital needs assessments and implementation meetings with all CMHA staff.
- Participate in the assessment of properties recommended for disposition by preparing documentation and inspection.
- Schedule for the design activities of staff and outside A&E firms based on the

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funding and budgets provided.

- Organize the various projects and the design activities to assure timely completion.
- Determines whether work is best suited to be performed with staff or with outside firms.
- Assign and monitor work activity of staff and outside architectural/engineering firms.
- Review and edit of architectural and engineering plans while under development and before solicited.
- Schedule meetings and review with other CMHA department's scopes of work, drawings and bid solicitations.
- Incorporate all recommendations from both RECD and other CMHA staff on scopes of work, drawings and bid solicitations prior to solicitation. Inform staff and provide reasoning why recommendations were not included.
- Insures high standards of performance on all design and development work.
- Control the implementation of the design throughout the construction phase, maintaining close and direct communication and interaction with the Construction/Project Manager.
- Provide design support and recommendations in addressing change orders, differing site conditions, and claims.
- Maintain energy usage metering stats, cost, and calculations.
- Produce analysis and changes in utility allowances.
- Communicate directly with other associated departments, consultants, public agencies, building departments, and residents to clarify needs, coordinate the activities of the Housing Authority, and assure compliance with federal, state, and local regulation.
- Evaluate the performance of staff. Establish objective criteria to measure performance. Ensure fair and consistent treatment of staff and applicable union agreements.
- Skilled in applying technical knowledge to practical situations.
- Ensure compliance with federal, state and local regulations.

### 2.3 Project Manager Scope of Work

*The below statements are intended to describe the general nature and scope of work being performed by these consultants. This is not a complete listing of all responsibilities, duties and/or skills required. Other relevant duties may be assigned.*

- Will work with other departments to determine the scope and budgetary requirements of proposed developments.
- Responsible for assuring that essential information is included in the Request for Proposal documents (RFP) and assist in the selection of appropriate firm to carry out activities.
- Convey all project requirements to the appropriate parties and ensure all are being adhered to.
- Oversee and review all designs and drawings, including specifications, in order to ensure that codes and technical requirements are met.
- Organize a variety of projects and construction activities to ensure timely completion. Maintain project schedules of contractors. Assigns and monitors work activity to outside firms to ensure compliance with code and regulations.
- Enforce standards to ensure both resident and worker safety on all assigned construction sites.

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- Ensure a consistently high standard of performance on all construction and development work.
- Control the implementation of the construction phase maintaining close monitoring of construction and direct communication and interaction with the contractors.
- Oversee and control the entire change order and claims process from identification through implementation as appropriate.
- Review request for payments for contractors for work performed, conducts site inspection and review performance, assuring a completeness and accuracy of payment requests.
- Control contract performance schedules, determining the validity of contract time extension.
- Actively assist in managing project budgets and develop scenarios which enable the budget to be achieved.
- Regularly and systematically communicate and update development team concerning proposed developments.
- Assist with zoning and permit requirements, variances, and other regulatory concerns.
- Conduct job site inspections to monitor compliance with design documents.
- Insure that all parties maintain current "As Built" drawings so that each deviation from construction plans, blueprints and documents is properly documented for future reference for maintenance, remodels and additions.
- Perform essential project control activities for the development including implementation systems to manage scope, schedule, costs, risk, resources, consultants/contractors, contracts, and communication. Will oversee contract and assure contract compliance on assigned projects and compliance with federal, state and local regulations.
- Ensure a consistently high standard of performance on all construction and development work.
- Perform additional related duties as assigned.

**2.4 Real Estate Senior Development Analyst Scope of Work**

*The below statements are intended to describe the general nature and scope of work being performed by these consultants. This is not a complete listing of all responsibilities, duties and/or skills required. Other relevant duties may be assigned.*

- Underwrite multi-family real estate investment opportunities
- Correspond with owners and brokers to gather due diligence;
- Assist with evaluating and underwriting development projects;
- Review and analyze legal documents, financial reports and operating plans as part of the due diligence process;
- Assist with preparation of 4% and 9% LIHTC applications and all associated ancillary documents for the processing of any equity financing;
- Review and update pro-forma financials for large scale residential projects and create pro-forma financials is tax credit equity applications;
- Coordinate market research;
- Analyze LIHTC and other affordable housing programs to determine project feasibility;
- Assist with coordination of project management goals of multiple affordable housing transactions, including the
- acquisition, development, refinancing, and/or rehabilitation of affordable housing

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- projects, including through the use of LIHTC;
- Assist with working with lenders, including but not limited to FHA, to secure debt for new construction and refinancing;
  - Assist with working with project team on various tasks needed to complete affordable housing funding applications;
  - Assist with ongoing financial modeling of the development;
  - Support and may oversee progress of seller, buyer and lender due diligence checklists;
  - Provide research and analytical assistance;
  - Track project status, coordinates meetings, track deliverables both internally and externally;
  - Order and critically review third party reports for development projects;
  - May assist with coordinating and assembling funding draw requests during construction for review by the
  - Development Director, ensuring adherence to approved project budget; obtain funding approval of financial partners; oversee facilitation of funds once released to ensure timely payment/reimbursement of project costs; track interest payment deadlines during construction;
  - Communicate with internal clients and external vendors; and
  - Perform additional duties as assigned.

**3.0 Pool of Contractors**

- 3.1** 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.
- 3.2** 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.
- 3.3** 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 is 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.

### 4.0 Performance Standards

- 4.1 The Development Consultant will have 24 hours to reply to any correspondence from CMHA staff. Continued failure to provide timely responses may result in termination of the contract.
- 4.2 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.
- 4.3 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.)
- 4.4 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
- 4.5 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)

- 4.6 CMHA may waive the fee reductions at their discretion after discussing extenuating circumstances with the Contractor. Such waiver shall be in writing at

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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.

**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: \$400,000 annually. CMHA reserves the right to adjust these amounts, if in its best interest to do so, prior to contract approval.