



**CHICAGO HOUSING AUTHORITY (“CHA”)
REQUEST FOR PROPOSAL (“RFP”) EVENT NO. 3270 (2025)
for
Professional Property Management Services**

**Required for use by
[Property and Asset Management]**

ISSUED ON: Thursday, February 13, 2025
ISSUED BY: DEPARTMENT OF PROCUREMENT AND CONTRACTS

**PROPOSAL DEADLINE:
Wednesday, March 26, 2025 at 10:00 A.M., CT**

Proposals may be submitted early but must be received electronically no later than the date and time listed in the solicitation.

PROPOSALS WILL NOT BE ACCEPTED AFTER THE DUE DATE AND TIME

Respondent Name: _____

Contact Name: _____

Contact Telephone: _____

Contact Email: _____

This selection process is unique to the Scope of Work described herein and notwithstanding any other proposal, qualification or bid requests provided by the Chicago Housing Authority. Proposers must comply with the requirements as defined in this RFP.

Angela Hurlock
Interim Chief Executive Officer

Sheila Johnson
Deputy Chief Procurement

www.thecha.org

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RESPONDENT CONTACT WITH CHA: The Procurement Specialist identified below is the *sole point of contact* regarding this RFP from the date of issuance until selection of the successful proposer(s).

Tamika Carson, Procurement Director
Chicago Housing Authority
Department of Procurement and Contracts
60 East Van Buren Street, 8th Floor
Chicago, Illinois 60605
Phone: (312) 863-3401
E-mail: Tcarson@thecha.org

Responses shall be submitted via the Supplier Portal at <https://supplier.thecha.org> no later than **Wednesday, March, 26, 2025 by 10:00 AM, CST.**

The Proposer shall be responsible for electronic submission by the due date and time. Late proposals will not be accepted.

An **in-person** pre-proposal conference is scheduled for **Monday, February, 24, 2025**, at 12:00 PM. CST to discuss the scope of services and the CHA diversity and inclusion requirements. The meeting address is Charles A Hayes Family Investment Center, 4859 S Wabash Ave, Chicago, IL 60615 in the Multi-Purpose Room. In order to participate onsite, you will need to **RSVP by Friday, February, 21, 2025 at 12:00 PM**, CST with Tamika Carson via email at TCarson@thecha.org. Please submit your Company Name, Your Name and email address confirming reservation.

The Letter of Intent to Submit a Proposal, Attachment B, is due **Wednesday, March, 5, 2025**, at 10:00 AM. CST. The Letter of Intent to Submit a Proposal, Attachment B must be submitted via the Supplier Portal at <https://supplier.thecha.org>.

If you do not intend to submit a proposal in response to this RFP, please submit via the Supplier Portal at <https://supplier.thecha.org>, a brief explanation in order to continue to receive future bid/RFP notices.

Questions regarding clarification or verification of these specifications and CHA diversity and inclusion requirements must be submitted via the Supplier Portal at <https://supplier.thecha.org>. no later than **Thursday, February, 27, 2025 by 10:00 AM, CST.**

Electronic Submission: CHA requires Respondents to submit an electronic proposal for the above-described Event. Respondent shall upload all documents via the CHA Supplier Portal at: <https://supplier.thecha.org>. Electronic proposal submission requires only one (1) copy. Each submittal section of the electronic proposal shall be labeled and separated into a different file as described in "ARTICLE V Submittal Requirements."

Note: There is no maximum file capacity size when uploading attachments in the Supplier Portal. If you receive an error message that states the "Maximum size is: 50" while uploading an attachment in the Supplier Portal, that error message is referring to the file naming size. The name of your file cannot be more than 50 characters. For questions or assistance with the Supplier Portal, please contact Harriet Herron-King, Procurement Coordinator, at 312-913-7356, HHerron@thecha.org. **Respondent shall bear all costs of responding to this solicitation.**

ARTICLE I INTRODUCTION

CHA is the third largest public housing authority in the nation and the largest single owner of rental housing in Chicago. Through its public housing and voucher programs, CHA serves 135,000 people in almost 65,000 households across all 77 of Chicago's community areas. CHA's mission is to create and sustain strong communities where seniors thrive and everyone can unlock their economic power, ensuring that every neighborhood in Chicago has quality affordable housing and everyone feels welcome.

In its procurement of its goods and services, CHA seeks relationships with vendors who share our values for inclusive and equitable contracting opportunities. CHA strives to be fair, transparent, and practical, and works to optimize the use of public funds through purchasing decisions. For more information, visit www.thecha.org.

ARTICLE II INTENT AND PURPOSE

This Request for Proposal ("RFP") is intended to select one or more third-party professional property management firms ("PPM") for the management of CHA-owned and operated residential properties. The CHA intends to select qualified companies or organizations with applicable experience in providing property management services for high performing real estate portfolios. The CHA is seeking Respondents who represent the highest standards of day-to-day property management functions to improve the quality of customer service and operations of our diverse portfolio of properties and to provide the best value to the CHA and its residents.

CHA anticipates it will award a firm fixed price contract for a base period of three (3) years, and reserves the right to extend the contract, at its sole discretion, for up to two (2) additional one-year option periods. No award may be made to a Respondent that is on the list of contractors not eligible to receive awards from the CHA or the United States government, as furnished from time to time by HUD. The CHA reserves the right to award one or more contracts in connection with this solicitation. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of the CHA.

Since 2000, the Chicago Housing Authority (CHA) has contracted with third-party professional property management companies for the management of all CHA-owned residential properties. CHA's Property and Asset Management Division monitors property management contracts.

CHA has participated in HUD's Moving to Work (MTW) demonstration program since 2000 and is an industry leader in using MTW flexibilities to enhance the cost effectiveness and efficiency of its housing programs, expand housing opportunities for low-income residents and provide opportunities for residents to achieve self-sufficiency. CHA has implemented twenty-six innovative MTW programs and policies designed to achieve these goals.

Effective PPM companies are seen as a critical part of the strategy to protect the investments made in our real estate portfolio while also supporting healthy mixed-income communities for our residents and the City of Chicago. As such, fostering strong partnerships with property management firms is key to successfully providing affordable, safe housing in diverse neighborhoods across the City of Chicago. Success also requires that existing families have

ARTICLE III SCOPE OF SERVICES/STATEMENT OF WORK

A. SCOPE OF SERVICES

CHA's focus shall be to provide oversight of and guidance to the PPM in its performance of Services at the Property. PPM shall perform the following Services in accordance with the terms set forth in this Agreement.

1. **Occupancy Administration:**

- a. **Leasing** – PPM is responsible for the marketing and leasing of available units in accordance with the Administration and Continued Occupancy Policy (“ACOP”) and is expected to maintain occupancy at or above 98%. To view the ACOP visit <https://www.thecha.org/about/plans-reports-and-policies>.
- b. **Centralized Leasing Team** - PPM may create a centralized leasing team for marketing, screening, and leasing, at their own expense.
- c. **Tenant Re-examination** – PPM shall perform a complete re-examination of Tenant households in a timely manner and in compliance with all applicable federal, state and local laws, statutes, ordinances, rules, regulations, executive orders and the ACOP.
- d. **Lease Enforcement** – PPM shall enforce the CHA Residential Lease in accordance with the ACOP and Admin Plan.
 - i. Lease enforcement actions must be clear, timely, and fairly applied in accordance with all CHA policies.
- e. **Mandatory Attendance** – PPM is required to have full participation in all CHA activities, including board meetings, building meetings, emergency meetings, budget presentation and review, elections, and owner surveys. The management firm is required to provide all meeting agendas and minutes, along with their notes of key items from any meeting to the CHA Portfolio Manager for review and recommendations on next steps, where applicable. In Associations where CHA's percentage of ownership is significant enough for votes to secure CHA a seat on the Board of Directors, participation at that level is required by the management firm, as an agent for CHA.

2. **Building Operations and Maintenance:**

- a. **Building Systems Preventive Maintenance** - Preventive maintenance (PM) is a proactive strategy for building maintenance that keeps the building's critical assets in good working order. It includes regular inspections and selective service and repairs to the building's equipment at set intervals based on usage or time. Service completed in this regard is not based on the component's condition. CHA staff or a designated third-party vendor may determine that the building systems are poorly maintained by the PPM, CHA reserve the right to identify and deploy a vendor to address the building equipment where applicable at the PPM's expense. A default notice is not required prior to implementing a response.
- b. **Preventive Maintenance and Work Orders (Emergency and Non-Emergency)** – PPM must adhere to the CHA's Work Order Policy and perform necessary maintenance and repairs promptly while being courteous to CHA residents.
- c. **Long Term Maintenance/Replacement/Capital Needs Planning** – PPM must prepare and maintain long term maintenance, replacement and capital needs

- plans and schedules, as well as oversee any needed construction, in coordination with the CHA.
- d. **Unit Turns** – PPM shall be responsible for unit turns and completing the work within 30 days of a unit becoming vacant. PPM shall utilize Section 3 Business Concerns and adhere to CHA's Design Standards for unit turn work.
 - e. **Vacant Unit Readiness** - All vacant units must be trashed out and have active utilities within 72 hours or no later than three days after the official moveout. If a unit will not be ready by the 3rd day, the property PPM must notify owner in writing with a plan of action
 - f. **Cleanliness** – The Chicago Housing Authority's requirement for the Professional Property Management companies to maintain cleanliness & sanitation (to a professional standard) of all residential assets with areas and items therein being free of visible dirt and debris. Daily janitorial services performed as well as periodic reconditioning of walls and flooring is the basis of property management in relation to ensuring proper upkeep of any development (internally and externally) while simultaneously enhancing the quality of life for residents within its structure. If it is determined by CHA staff that the development is not being maintained in this realm as contracted after the expiration of the allotted time provided to cure, CHA reserves the right to identify and deploy a vendor to address the existing violations at the PPM expense. A default notice is not required prior to implementing the response.
 - g. **Fixed Assets** – PPM shall be responsible for the proper care of and accounting for all of Owner's fixed assets (See Exhibit N of the Professional Property Management Agreement).
 - h. **Section 3 Business Concern Preference** – Whenever feasible, PPM should utilize Section 3 business concerns in furtherance of the compliance goals set forth in Section 3.9 of the Professional Property Management Agreement.
 - i. **Green Operations and Maintenance** – PPM is encouraged to use green operations and maintenance innovations for the Property, where feasible, including implementing a CHA approved plan for water conservation and implementing and maintaining a green purchasing policy which considers and improves indoor air quality.
 - j. **Code Violations** – PPM must respond appropriately to all notices from the City of Chicago and other governmental entities regarding the condition of the Property, including engaging legal counsel, at PPM's sole expense, to represent the interests of the CHA in any administrative hearings or court actions. PPM agrees to submit monthly updates on the status of its defense of the code violations and provide proof of payment to the appropriate government agency that issued the citation or notice of violation.
 - k. **Fines, Penalties and Late Fees** – PPM is responsible for the payment of all fines and penalties assessed against the Property. These payments may not be charged against the property budget.
 - l. **Management Plan** – PPM shall prepare an annual Management Plan for each Property which will provide for clear and consistent communication with residents and be submitted for approval by the CHA. Plans for the acquisition and retention of qualified staff, and the maintenance of necessary staffing levels should be outlined.
 - m. **Technology and Systems** – PPM must utilize CHA's designated system of record that Owner may implement to manage and track all relevant information of units, applicants, residents, properties, budgets, and expenses. PPM must also use CHA's preferred compliance tracking software (B2G now and LCP

Tracker). PPM may use other standard business software (e.g., Microsoft Outlook, Word, Excel, Access) for its electronic storage and communication of files with Owner.

- n. **Other Administrative Requirements** – PPM shall adhere to a variety of other administrative requirements, such as:
- i. Provide support during internal and external audits;
 - ii. Run and submit reports to CHA on as-needed/on-going basis. Take appropriate corrective actions;
 - iii. Maintain appropriate office hours. The required hours of operation for each property are 8 am to 5 pm, Monday – Friday and Saturday 9am to 12pm, except for holidays observed by CHA. PPM must hold some evening and weekend hours each month to accommodate working residents; and
 - iv. PPM shall maintain a twenty-four (24) emergency response system. PPM must maintain an after hour answering service staffed by a live person (not recording), prepared to forward emergencies to the assigned maintenance and/or management personnel on a 24-hour basis. The assigned staff must promptly respond to emergencies and immediately notify the Owner through the Emergency Services Operations Center (ESOC), in accordance with CHA procedures. PPM shall further report the emergencies, actions taken and any abatement procedures to Owner within twenty-four (24) hours of such event, and in accordance with CHA procedures.

3. **Property Inspections:**

- a. **Inspections** – PPM must prepare for and participate in any required inspections of the Property. In addition, PPM is expected to document all observable deficiencies, resident infractions, repairs, and other matters that require work orders to be generated. PPM shall always comply with the Private Property Management Procedural Manual.
- b. **Unit Inspection** - PPM will be required, within the first 90 days of this Agreement, to walk every property in its assigned portfolio, and is required to submit a unit condition and an occupancy report.

4. **Safety and Emergency Response:**

- a. **Safety and Security** – PPM will coordinate with CHA's Safety and Security and Emergency Services teams as well as the Chicago Police Department, Chicago Alternative Policing Strategy ("CAPS") and the Chicago Fire Department.
- b. **Risk Management** – PPM must ensure its employees are following safety procedures, correcting unsafe conditions, filing incident reports for insurance purposes, and taking necessary steps to minimize risk and exposure.
- c. **Well-Being Checks** - Well-being checks will be required during extreme weather events. During extreme weather events PPM is required to complete the following:
 - i. Perform well-being checks on frail residents at 9 am, 1 pm, and 6 pm.
 - ii. Record in-unit temperatures with a non-contact infrared thermometer.
 - iii. Report finding to Emergency Services Operation Center (ESOC) no more than 90 minutes after the cycle of well-being checks begin.
 - iv. If a unit registers at an unacceptable temperature, report the finding immediately to CHA and ESOC, then attempt to cure.

- d. **Emergency Relocation** – PPM shall secure emergency hotel accommodations for residents if their unit(s) becomes uninhabitable. Additionally, PPM shall budget for advancing payment of such accommodations upfront, in accordance with any hotel policies.

5. Resident File Management:

- a. **File Retention** – PPM will adhere to the CHA Records Management Policy and all applicable federal (i.e., HUD), state and local laws, statutes, policies, ordinances, rules, regulations, and executive orders.
- b. **File Audits** - PPM will be required to certify on day one of the transition that all files are present. PPM will have 1 calendar year from the start of the contract to audit 100% of residential files and confirm completion by the 1st day of year 2 of the contract.
- c. **File Certification** – PPM must audit, correct (when applicable), and certify that residential files are compliant in the month of renewal. This is applicable to files with annual, biennial or a triennial lease despite the year the actual renewal is due.

Files are required to be maintained in the management office and/or CHA’s electronic file management system, as applicable. All files shall be maintained in an organized manner, in accordance with all HUD and other applicable requirements, and must be kept current and secure. PPM shall scan paper copies of files into electronic records, organize them in CHA’s file management system, and cooperate with CHA and its assigns, if any, to ensure efficient and effective access to CHA files and records remotely. At a minimum, PPM’s files shall be maintained on the following:

- i. Resident files
- ii. Unit files
- iii. Procurement/Compliance files
- iv. Work order files, including NSPIRE inspections
- v. Inventory files
- vi. Preventive Maintenance/Warranty files.

6. Customer Service Satisfaction:

- a. **Customer Service** – PPM must provide customer service communication with integrity that is clear, consistent, transparent, and respectful for the interactions with a diverse resident population:
 - i. PPM should incorporate the following customer service components into its business practice: Accountability, Timeliness, Internal Controls, Organization Standards, Professionalism, Recruitment and Retention of Professional Personnel, Collaboration;
 - ii. PPM must utilize CHA’s Language Access Plan to provide multilingual services to CHA residents with Limited English Proficiency [“LEP”] visit <https://www.thecha.org/help/language-assistance>;
 - iii. PPM should monitor internal customer service through appropriate evaluations;
 - iv. PPM must perform random audits of Tenant files in CHA’s System(s) to ensure proper implementation of CHA’s policies, advisories and HUD PIH-Notices and regulations;
 - v. PPM should ensure seamless and courteous services to internal and external customers;

- vi. PPM must designate a Language Access Liaison to ensure appropriate implementation of CHA's Language Access Policy in every building; and
 - vii. PPM may utilize CHA's Community Alliance partners to coordinate marketing and outreach activities for hard-to-reach populations.
- b. **Community Engagement** – PPM will foster crucial partnerships and expand education opportunities for CHA clients through community engagement, and the FamilyWorks provider for residents living in family properties including:
- i. Solidify CHA's reputation as a reliable and accessible resource in the community;
 - ii. Develop new and beneficial partnerships that engage participants and neighbors solidifying CHA's presence in the City of Chicago communities; and
 - iii. Conduct wellness checks to provide assistance when needed.
- c. **Coordination with Appropriate Services** – PPM shall work with social services via the Resident Service Coordination Program which will link CHA senior and family residents to the social services and opportunities necessary to maintain a stable and high quality of life.
- d. **Quality Control** – PPM shall implement a quality control program ("QC") designed to assure quality in the services being provided. The QC program should also include procedures for an internal audit of PPM's own processes to be conducted and reported to the CHA.
- e. **Wellness Checks** – PPM must perform wellness checks in accordance with CHA procedures, and any local ordinances.
7. **Rent Collection:**
PPM must collect at least 98% of the total monthly rent due, while diligently working toward 100% collection.
8. **Compliance:**
Regulatory and Legal Compliance – PPM shall comply fully with all federal, state, county, municipal, and special district laws, ordinances, rules, regulations, orders, consent decrees, voluntary compliance agreements and settlement agreements, as they relate to PPM's performance of duties in this Statement of Work.
9. **Financial Reporting:**
PPM must perform its fiscal responsibilities for sound financial management and adhere to Generally Accepted Accounting Principles in record keeping and reporting. PPM must establish controls and follow best practices and procedures for budgeting, spending, incurring personnel and property maintenance costs, Tenant collections and deposits, Tenant ledger maintenance, reconciliation, and reporting.
10. **E-Banking Solutions:**
Subject to Owner's consent, PPM may utilize commercial industry standard e-banking platforms, including remote deposit, positive pay, account reconciliation and other applications including ACH and wire transfer.
11. **Procurements:**
PPM shall be responsible for Procurements up to \$250,000. Any procurements above \$250,000 must be routed through the CHA Department of Procurement and Contracts for handling. All procurements must follow the requirements outlined in Section 3.7 of

the Professional Property Management Agreement, the PPMs Financial Procedures Manual (See Exhibit E of the Professional Property Management Agreement) and Required Reports (See Exhibit F of the Professional Property Management Agreement). PPM shall utilize along with its supplier list, the CHA Section 3 Business Concern portal to obtain potential vendors for quoting/solicitation purposes.

- a. All services shall be performed in conformance with the RFP, Management Plan and Governing Documents, as they may be modified from time to time by the Owner and upon appropriate written notice to PPM of those modifications, and other direction that the Owner may provide from time to time.
- b. CHA currently centrally procures the following services:
 - i. Security;
 - ii. Waste and Recycling;
 - iii. Annual Inspections
 - iv. Elevator Maintenance and Repair;
 - v. Elevator Inspections;
 - vi. Background Screening Services;
 - vii. Towing Services;
 - viii. Laundry Services
 - ix. Vending
 - x. Integrated Pest Management; and
 - xi. Materials and Supplies.
- c. While CHA may centrally procure services, the PPM may have management responsibilities of some centrally procured services, as determined by CHA.

B. STATEMENT OF WORK

Due to the size and complexity of the CHA portfolio of properties, this RFP is comprised of) nineteen (19) distinct packages. The Respondent can respond to as few as one (1) or as many as all nineteen (19) of the packages. Respondents are encouraged to evaluate their capabilities and resources in relation to each package and respond to only those packages where their firm can provide value to the CHA and its residents. There is no scoring impact based on the number of packages proposed by the respondent.

For a detailed list of the properties in each package, please review the proposal package attachment. An overview of each property type and proposal package is below.

CHA acquires and disposes of properties from time to time and reserves the right to add and/or remove properties from each package at its sole discretion.

1. **Family Housing:** The CHA owns 4,695 units of traditional family public housing in 10 developments and three mixed income properties. The oldest family public housing development was built in the late 1930s. These developments consist of rowhomes and walk-ups with the exception of Lake Parc Place and Dearborn Homes, which are mid-rise buildings. This portfolio is primarily distributed across the South and West sides of the City of Chicago and includes the following developments with unit counts:

<u>PROPERTY NAME</u>	<u>UNITS</u>
1. Altgeld Gardens	1,541
2. Trumbull Homes	465
3. Lowden Homes	127
4. Dearborn Homes	668
5. Wentworth Gardens	343
6. Lake Parc Place	290
7. Bridgeport Homes	129
8. Lawndale Gardens	121
9. Cabrini Green Homes	146 (Plus 438 Restricted Vacancies)
10. ABLA Homes	330
11. Orchard Park	81
12. Domain Lofts	16
13. Jazz on the Boulevard	39

Family Housing properties are traditional public housing developments. These properties have all received major renovations. The current waitlist times for these properties range from as little as six (6) months to several years for some bedroom sizes.

Family Housing also includes CHA stand-alone owned properties and CHA-owned units in larger properties and developments commonly referred to as Mixed-Income. In most instances, CHA is a unit owner/member of the larger community. CHA currently owns 97 units within 3 mixed-income communities (Orchard Park, Jazz on the Boulevard and Domain Lofts) that Respondent(s) to Proposal Package 18 will also need to account for in their proposals.

CHA's Mixed Income communities began in the late 1990's. The units in this growing portfolio are in recently developed or renovated condominium buildings or townhouse communities across the city. If CHA acquires ownership of additional public housing units in mixed income communities, it is anticipated that the Selected Respondent(s) may manage those units as they are acquired by the CHA.

The Selected Respondent(s) shall also be expected to represent the CHA's interests with each of the associated condominium and townhouse associations, (including but not limited to attendance at regular association meetings, voting for board members, review of association budgets, and representation of CHA residents' concerns and interest).

2. **Scattered Sites:** Scattered Sites buildings are of various housing stock, including single family, townhomes, two-flats, three-flats, and larger multi-family units with up to 50 units per building. The most common housing stock in this portfolio are two- and three-flat buildings. These properties are located at over 950 unique addresses across the City of Chicago. The CHA owns 3,437 scattered site housing units and all are included in this solicitation.

The oldest Scattered Sites unit was built in the late 1960's. See the Proposal Packages for a detailed listing of properties. CHA has invested over \$30 million in the scattered sites portfolio.

The waitlists for scattered site properties are site-based for some properties that have a large number of units at one address. In general, the waitlists are based upon an aggregation of the scattered sites within one of the 77 Chicago community areas. As this portfolio is predominately 3-bedroom units and, to a lesser degree 2-bedroom units, the wait times for community areas vary greatly by bedroom size and area, with most having wait times greater than five (5) years.

<u>Scattered Sites</u>	<u>UNITS</u>
Scattered Sites - North	1,439
Scattered Sites - West	606
Horner Westhaven	353
Scattered Sites - South	363
Washington Park	252

The Scattered Sites portfolio includes CHA stand-alone owned properties and CHA-owned units in larger properties and developments commonly referred to as the Mixed Income/Mixed Finance Portfolios (Lake Park Crescent for Sale, included in Scattered Sites). In most instances CHA is a unit owner/member of the larger community. The CHA currently owns 26 units within Lake Park Crescent for Sale that Respondent(s) to Proposal Package 9 will also need to account for in their proposals.

3. **Senior Housing:** The CHA owns 7,459 units of senior designated housing in approximately 50 mid- to high-rise buildings. The senior designated housing portfolio is comprised of properties that house applicants age 62 and older or those age 55 and older with a disability, and reduced age senior designated housing which house applicants age 55 and older. The current waitlist times for the senior portfolio of properties range from as little as six (6) months to over five (5) years. The buildings have a mix of one bedroom and studio apartments. Currently this portfolio has converted 3,959 of its public housing units to project-based voucher (PBV) units through the Rental Assistance Demonstration program (RAD) and may convert the remaining units through the RAD program over the next several years.

The Senior portfolio was generally built during the 1960s and 1970s. These **properties** have undergone or are in the process of undergoing major rehabilitations that will be completed during the term of this agreement which include life safety upgrades, mechanical, electrical, and plumbing upgrades, interior improvements and building envelope renovations. The RAD program has been vital to CHA's efforts to provide much needed capital investments in the portfolio and ensure a more stable subsidy source for years to come. Strategically, CHA plans to reposition all traditional public housing senior units in the coming years. CHA may, at any time and at its sole discretion, convert units to RAD. PPMs are required to meet requirements outlined in any proposed RAD management agreement or financing agreement. Note that the resident supportive services for these senior designated housing properties shall be procured and awarded separate and apart from this RFP.

4. **Tax Credit and Financed Housing:** The CHA currently has nine (9) Low-Income Tax Credit (LIHTC) properties. This portfolio includes two family properties and seven senior designated properties, for a total of 1,825 units. Five of the properties have previously undergone major rehabilitations and three of the properties ended their 15-year tax credit compliance period.

For a detailed list of the properties in each package, please review the proposal package attachments. An overview of each property type is below.

Package 1

Package 1 – 883 units	
Property	Units
Bridgeport	129
Lake Parc Place	290
Lawndale Gardens	121
Wentworth Gardens	343

Package 1 is comprised of 883 campus style, family public housing units. This package also includes Lawndale Gardens, CHA's first small-scale two-story rowhouse structure, and Wentworth Gardens, the last property built to house war-industry workers.

Package 2

Package 2 – 1,582	
Property	Units
ABLA	330
Dearborn Homes	668
Cabrini Rowhouse	584

Package 2 embodies 1,582 family public housing units where the ABLA development is undergoing renovation for a new thriving community construct.

Package 3

Package 3 – 1,167	
Property	Units
Armour Sq	392
Mary Jane Richardson-Jones	267
Alfred Barnett Duster	129
Lidia Pucinska	379

Package 3 is a compilation of our public housing age-restricted developments with high-rise and mid-rise elevator buildings located on the south side of Chicago. This package has a total of 1,167 senior units.

Package 4

Package 4 – 1,858	
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Property	Units
Mary Hartwell Catherwood	358
Ella Flag Young	437
Wicker Park	225
Maria Martinez	317
Flannery	252
Zelda Ormes	269

Package 4 consist of 1,858 public housing age-restricted developments with high-rise and mid-rise elevator buildings located on the north side and northeast side of Chicago.

Package 5

Package 5 – 1,474	
Property	Units
Lincoln Perry Apts.	449
Vivian Gordon Harsh	124
Minnie Ripperton	339
Judge Slater Apts.	407
Judge Green	155

Package 5 contains 1,474 RAD senior units on the south side of Chicago. RAD is a central part of the Department's rental housing preservation strategy, which works to preserve the nation's stock of affordable rental housing, promote efficiency within and among HUD programs, and build strong, stable communities.

Package 6

Package 6 – 1,474	
Property	Units
Hattie Callner Apartments	153
Judge Fisher Apartments	199
Las Americas	214
Schneider Apartments	175
William Jones Apartments	118
Elizabeth Davis	149
Lorraine Hansberry	169
Daniel Hudson Burnham	181
Long Life	116

Package 6 contains of 1,474 RAD senior units located throughout the Chicago land area. RAD is a central part of the Department's rental housing preservation strategy, which works to preserve the nation's stock of affordable rental housing, promote efficiency within and among HUD programs, and build strong, stable communities.

Package 7

Package 7 - 51	
Property	Units
Region 1 Large (50+) Units	51

Package 7 is a large development near the northeast region of Chicago with 51 public housing units.

Package 8

Package 8 - 51	
Property	Units
Region 3 Large (50+) Units	51

Package 8 is a large development on the south side of Chicago with 51 public housing units.

Package 9

Package 9 - 434	
Property	Units
Region 1 Medium(7-49) Unit	189
Region 2 Medium(7-49) Unit	169
Region 3 Medium(7-49) Unit	31
Region 4 Medium(7-49) Unit	45

Package 9 consists of 434 public housing units within market rate rental developments located throughout Chicago.

Package 10

Package 10 – 252	
Property	Units
Washington Park	252

Package 10 is CHA's Washington Park property. This low rise, public housing family development includes 252 units within Grand Boulevard, Woodlawn, Hyde Park, and the Washington Park community area.

Package 11

Package 11 - 353	
Property	Units

Horner - Westhaven	353
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Package 11 is CHA's Horner-Westhaven property. This low rise, public housing family development includes 353 units on the west side of Chicago.

Package 12

Package 12 - 1,541	
Property	Units
Altgeld/Murray	1,541

Package 12 is Altgeld Gardens. Altgeld Gardens is a public housing, family campus style, and the largest property in CHA's portfolio at 1,541 units. Property is located on the far south side of Chicago near a major expressway.

Package 13

Package 13 - 1,133	
Property	Units
Region 1 Small (2-6) Units	1,133

Package 13 contains 1,133 public housing small units within market rate neighborhoods throughout the northeast community areas.

Package 14

Package 14 - 426	
Property	Units
Region 2 Small (2-6) Units	426

Package 14 includes 426 public housing small units within market rate neighborhoods throughout the west side of Chicago community areas.

Package 15

Package 15 - 228	
Property	Units
Region 3 Small (2-6) Units	228

Package 15 includes 228 public housing small units within market rate neighborhoods throughout the south side of Chicago community areas.

Package 16

Package 16 - 288	
Property	Units
Region 4 Small (2-6) Units	288

Package 16 consists of 288 public housing small units within market rate neighborhoods throughout the southwest community areas.

Package 17

Package 17 - 242	
Property	Units
Region 1 Single Units	66
Region 2 Single Units	32
SS Region 3	32
Region 3 Single Units	21
SS Region 4	2
Region 4 Single Units	89

Package 17 is formed of 242 public housing single family detached home units within areas located throughout Chicago.

Package 18

Package 18 - 136	
Property	Units
101-Domain Lofts	16
090-Orchard Park	81
119-Jazz On the Boulevard	39

Package 18 is composed of 136 mixed income units. Homes are offered within Jazz on the Boulevard which includes families with children, singles, and couples of varying incomes.

Package 19

Package 19 - 60	
Property	Units
Presbyterian Homes	60

Package 19 consists of 60 public housing units. The three buildings are Crowder Place, Mulvey Place, and Devon Place in the West Ridge community.

Compensation

Successful respondents will be compensated based on a firm fixed fee per occupied unit at each property. Compensation for offline units, such as the offline Cabrini units, will be paid at a rate of \$10 per unit. The annual Management Fee shall be paid in twelve equal monthly installments.

Performance Standards

1. Description

PPM is expected to fulfill the performance requirements set forth herein. The PPM's performance shall directly affect the total compensation made eligible to PPM under this Agreement. Each performance standard will be measured by CHA on a monthly, quarterly, and/or annual basis. The Management Fee paid to PPM shall be subject to potential sanctions in accordance with the performance standards detailed below. PPM shall have an opportunity to review and, if necessary, dispute CHA's performance measurement data. PPM may also be asked to provide supporting documentation to refute a decision. All performance standard scoring shall be rounded to the nearest whole percent. For example, an average score of (94.5%) shall be scored at ninety-five percent (95%) and 94.4 shall be scored at ninety-four percent (94%). CHA shall assess performance standards within thirty (30) days from the last day of the month.

In assessing performance, CHA may, at its sole discretion, utilize data and reports provided by PPM to support its determination. Under no circumstance will a PPM's independent report supersede CHA's template. Sanctioned amounts shall be deducted from the Management fees that are owed to PPM under this Agreement.

PPM is required to correct deficiencies found through quality control or file audit reviews. All corrective actions must be in accordance with the requirements established by HUD, the CHA's Admissions and Continued Occupancy Policy (ACOP), CHA's Administrative Plan, CHA's Private Property Management Procedural Manual, and/or any formal CHA Advisory.

Each Performance Standard set forth below includes a brief description of the standard being assessed, followed by specific ranges for which PPM's performance shall be deemed "Acceptable". These performance standards may vary for LIHTC properties.

2. Performance Standards and Adjustments to Compensation

a. Leasing and Continued Occupancy: Owner expects its lease-ready units to be maintained at an occupancy rate of at least 98%

- Areas subject to review: Public Housing/RAD
- CHA management tool used to measure performance: Yardi
- Acceptable Performance Level: 96%

b. Maintenance (Work Orders): Emergency work orders are requests for repairs that cure, or abate, imminent threats to life, health, or safety (including fire safety). PPM must resolve emergency work orders within 24 hours of notification. Urgent work orders include items that, if not repaired, pose potential threat to life, facilities, health, and/or safety of residents. Urgent work orders must be addressed within 48 hours of notification. A routine maintenance (non-emergency and non-urgent) work order does not create an imminent safety risk and must be completed within five (5) days for Senior properties and ten (10) days for Family properties. Such work orders consist of routine repairs to be completed by PPM. Owner has established timetables for

the completion of emergency, urgent and routine/non-emergency maintenance work orders.

- Areas subject to review: Public Housing/RAD
- CHA management tool used to measure performance: Yardi/CHA's system of record
- Acceptable Performance Range: 98%

c. On-Time Tenant Re-examinations: PPM shall complete a re-examination for each participating family at the prescribed time(s) required by CHA's ACOP and Administrative Plan. PPM must ensure that Tenant re-examinations are conducted pursuant to HUD regulations and the CHA's ACOP, Administrative Plan, and any other relevant processes, policies, and regulations.

- Areas Subject to Review: Public Housing/RAD
- CHA management tool used to measure performance: HUD's system of record and/or Yardi/CHA's system of record
- Acceptable Performance Range: 90%

d. Quality Control of Tenant Files: All documents required by HUD, CHA's ACOP, CHA's Private Property Management Procedural Manual, a formal CHA advisory, or any other housing program requirements must be properly indexed in the Tenant's file folder at the time of Owner's review. PPM shall ensure that all items are properly indexed and calculated correctly in accordance with established requirements for any processed transaction. In the rating of the PPM's performance, an error found and corrected by the PPM prior to the CHA review is acceptable under the following conditions: (1) the error was identified prior to the effective date of the transaction; and (2) the error does not require a modification to the transaction effective date that would otherwise be in effect if the error was not made.

- Applicable subject area: Public Housing/RAD
- CHA management tool used to measure performance: Yardi
- Acceptable Performance Range: 90%

e. Rent Collection: CHA expects the PPM to collect and properly record at least 98% of the billed rent on a monthly basis.

- Areas Subject to Review: Public Housing/RAD
- CHA management tool used to measure performance: Yardi
- Acceptable Performance Range: 95%

f. Work Compliance: Owner expects the PPM to collect and properly record 100% of all residents subject to CHA's Work Requirement the correct status of Compliant, Safe Harbor, Non-Compliant, Exempt, and Legal.

- Areas subject to review: Public Housing
- CHA management tool used to measure performance: Yardi
- Acceptable Performance Level: 98%

3. Miscellaneous

Tenant Relations: PPM must provide excellent customer service and implement business models that address residents' issues and concerns in a timely manner. CHA reserves the right to conduct periodic customer satisfaction surveys. CHA will review the survey tool with PPM prior to distribution. Surveys may be sent either electronically or during scheduled site visits. A pattern of low survey results and customer complaints may establish conditions for a Default.

- Areas subject to review: Public Housing
- CHA management tool used to measure performance: Resident Satisfaction Survey (See Attachment D Private Property Management Agreement, Exhibit M)
- Scoring Range: 1.0 to 5.0
- Acceptable Performance Level: 3.75

4. Summary of Performance Standards

No.	Performance Indicator	Minimum Performance Requirement	Sanction Amount
1	Leasing/Occupancy	96%	Up to \$2,500 per instance*
2	Maintenance (Work Orders)	98%	Up to \$2,500 per instance
3	On-Time Tenant Re-examinations	90%	Up to \$2,500 per instance
4	Quality Control of Tenant Files	90%	Up to \$2,500 per instance
5	Rent Collection	95%	Up to \$2,500 per instance
6	Work Compliance	98%	Up to \$2,500 per instance

*For RAD properties, sanction amounts equal to the HAP amount for each unoccupied unit may be implemented, at CHA's sole discretion, if the PPM fails to take the necessary steps to lease units vacant longer than 60 days in a timely fashion.

ARTICLE IV GENERAL INSTRUCTIONS

A. Acceptance of Proposals

Proposals in response to this RFP must be received (electronically) through the CHA Supplier Portal. Proposals must be received electronically no later than the **date and time** listed in the solicitation. **Proposals submitted after the designated date and time will not be accepted for any reason.**

CHA reserves the right to accept or reject any or all proposals, issue addenda, or to waive any informalities. A Respondent whose proposal fails to fully comply with the requirements of the RFP may be determined to be nonresponsive and excluded from further consideration.

B. Time for Receiving Proposals

Proposals received prior to the due date and time will be maintained in a secure place, unopened. No proposal received after the deadline set forth on the cover page of this RFP will be considered. Proposals will not be publicly opened. Once submitted, proposals will become the property of CHA.

C. Right To Cancel

CHA reserves the right to cancel this procurement process whenever the best interest of CHA is served. CHA shall not be liable for costs incurred by Respondents associated with this procurement process.

D. Addenda

Any interpretations, corrections, or changes to the RFP will be made by addenda issued by CHA. Any addenda that are issued will be provided to prospective Respondents, posted on the CHA's Supplier Portal at: <https://supplier.thecha.org>, and noticed on the CHA website. It is the responsibility of the Respondent to inquire of the issuance of any addenda. Respondents shall acknowledge receipt of all addenda in the cover letter of the response. If CHA determines this RFP should be modified, it will inform all prospective Respondents by distributing addendum/addenda to this RFP before the date set for receipt of proposals.

E. False Statements

Any false statement(s) made by the Respondent (s) will void the response and eliminate the Respondent(s) from further consideration.

F. Withdrawal of Proposals

Proposals may be withdrawn by written request by the Respondent. A written withdrawal of a Proposal must be received, prior to the time set for opening of Proposals. A Respondent's negligence in preparing a Proposal creates no right of withdrawal or modification after the date and time set for opening of the Proposals.

G. Award of Contracts

CHA may award one or more Contracts according to the Evaluation Criteria contained in this RFP to responsible and responsive respondents, provided their Proposals are in the best interest of CHA. The Selected Respondent(s) will be notified at the earliest practical date. Each award may be subject to HUD approval. No award may be made to a contractor or firm that is on the list of contractor's ineligible to receive awards from CHA or the United States, as furnished by HUD.

CHA reserves the right to reject any and all proposals and reserves the right to secure services solicited by this RFP by means of a non-competitive procurement in accordance with §2 CFR 200.320 (c) or to re-solicit competitive proposals.

H. Notice of Contract Award

Unsuccessful Respondents will be notified in writing after an award of contract has been made by the Contracting Officer and/or Board approval, if required.

I. Right to Protest

In accordance with CHA's Procurement Protest Procedures (copies may be obtained by contacting the department of Procurement and Contracts), all protests regarding this solicitation document must be filed no later than five (5) business days before the due date for proposals. All other protests regarding the evaluation of proposals or award of contract by the Authority must be filed no later than ten (10) business days after the notice of contract award. Any protest filed after such date will not be considered.

J. Preparatory Costs

All costs incurred in the preparation and presentation of Proposals shall be wholly borne by each Respondent. All supporting documentation and manuals submitted with each Proposal will become the property of CHA unless otherwise indicated by the Respondent at the time of submission. CHA is not liable for any costs incurred by any Respondent prior to issuance of a Notice to Proceed.

K. Confidential Material

Any material submitted by a Respondent as part of a proposal that is to be considered confidential must be clearly marked as such but may be subject to disclosure under applicable law.

L. Subcontract / Sub consultants

All subcontractors proposed to be used under the Contract must be identified within the proposal. If the proposed services include the use of subcontractors, CHA will hold the prime contractor responsible for the proposed services to be provided by the subcontractors.

M. Minimum Wage Requirements

Any award under this solicitation shall be subject to the current local minimum wage requirement and prevailing wage determination for CHA. The minimum wage requirements shall be specifically incorporated as a contractual requirement in any award and agreement resulting from this solicitation for any of the Selected Respondent's covered employees. The Respondent must take the minimum wage requirement and prevailing wage determination for CHA into consideration in determining its staffing plan for services to be performed or provided by the Respondent under its

fee proposal and other submittals. Note that Federal wage determinations (either Davis-Bacon or HUD-Determined Wage Rates) preempt any conflicting State prevailing wage rate or the minimum wage requirement when the State prevailing wage rate or the minimum wage requirement is higher than the Federally imposed wage rate (24 CFR 965.101).

N. Disclosure Certification

The Contractor shall be required to make the following certification, which is included in the Contractor's Affidavit, a required submittal to be executed and notarized.

The Contractor certifies to the best of its knowledge and belief that it, its principals and any subcontractors used in the performance of this contract, meet the Agency requirements and have not violated any City or sister agency policy, codes, state, federal, or local laws, rules or regulations and have not been subject to any debarment, suspension or other disciplinary action by any government agency. Additionally, if at any time the contractor becomes aware of such information, it must immediately disclose it to the Agency.

The recommended firm(s) will be required to disclose the following information at the appropriate time during the solicitation process: Vendors' other business relationships including but not limited to: Board affiliations, positions, or board memberships with all other non-profit, government and other Chicago businesses.

O. Disqualify for Conflict of Interest

CHA reserves the right to disqualify any Respondent on the basis of any real or apparent conflict of interest that is disclosed by the proposal submitted or any other data available to CHA. This disqualification is at the sole discretion of CHA. Any Respondent submitting a proposal herein waives any right to object to such disqualification now or at any future time, before any body or agency, including but not limited to, the Board of Commissioners, City Council of the City of Chicago, Mayor's Office of Chicago or any company.

P. Participation by other Local Government Agencies

Other local government agencies ("Local Government Agencies") may be eligible to purchase Services pursuant to the terms and conditions of this Contract if such agencies are authorized, by law or their governing bodies, to execute such purchases, and if such authorization is allowed by the Chicago Housing Authority Contracting Officer, and if such purchases have no significant net adverse effect on CHA and result in no observed diminished ability on the Bidder to provide the Services to CHA or user departments pursuant to such purchases. Local Government Agencies shall include without limitation: City of Chicago, Chicago Park District, Chicago Public Schools, Chicago Transit Authority, City Colleges of Chicago. All purchases and payment transactions shall be made directly between the Bidder and the requesting Local Government Agency; CHA shall not be responsible for payment of any amounts owed by any Local Government Agency to Bidder. CHA assumes no authority, liability, or obligation on behalf of any Local Government Authority

Q. Bribery, Price Fixing, or Fraud

No person or business entity shall be awarded a contract or subcontract for a period of five years from the date of conviction or entry of a plea or admission of guilt, if that person or business entity:

- A. has been convicted of an act committed of bribery or attempting to bribe an officer or employee of a unit of state or local government or school district in that officer's or employee's official capacity; or
- B. has been convicted of an act of bid-rigging or attempting to rig bids as defined in the Sherman Anti-Trust Act and Clayton Act (15 U.S.C. §1 et seq.), or under the laws of the State of Illinois; or has been convicted of an act of price-fixing or attempting to fix prices as defined by the Sherman Anti-Trust Act (15 U.S.C. §1 et seq.) or under the laws of the State of Illinois; or
- C. has been convicted of defrauding or attempting to defraud any unit of state or local government or school district; or
- D. has made an admission of guilt of such conduct as set forth in subparagraph A through C above, which admission is a matter of record, whether or not such person or business entity was subject to prosecution for the offense or offense admitted to; or
- E. has entered into a plea of nolo contendere to charges of such conduct, as is set forth in subparagraphs A through C above.

For purpose of the Paragraph, "business entity" means a corporation, partnership, trust, association, unincorporated business or individually owned business. Where an official, agent or employee of a business entity committed the acts as set forth in subparagraphs A through E above on behalf of such entity and pursuant to the direction or authorization of a responsible official thereof, the business entity shall be chargeable with the conduct and be disqualified.

A business entity shall also be disqualified if it employs as an officer any individual who was an officer of another business entity at the time the latter committed a disqualifying act as set forth in subparagraphs A through D above.

A business entity shall also be disqualified if any owner directly or indirectly controls 20% or more of the business entity and was an owner who directly or indirectly controlled 20% of another business entity at the time, such business entity committed a disqualifying act as set forth in subparagraphs A through C above.

Any contract found to have been awarded in violation of this Paragraph may be voided at the discretion of CHA.

ARTICLE V SUBMITTAL REQUIREMENTS

A. Format

Respondents shall present their proposals as a firm offer which, if accepted by CHA in its entirety, shall be binding between the parties. Electronic responses submitted via the CHA Supplier Portal at <https://supplier.thecha.org> only require one (1) complete proposal. The Respondents must also include an indexed version of each submittal section of the electronic proposal shall be formatted, labeled and separated into a different file.

Note: There is no maximum file capacity size when uploading attachments in the Supplier Portal. *If you receive an error message that states the "Maximum size is: 50" while uploading an*

attachment in the Supplier Portal, that error message is referring to the file naming size. The name of your file cannot be more than 50 characters.

Proposals not containing all the submittal requirements (See Attachment C – Vendor Submission Checklist) may be deemed non-responsive to this RFP.

B. Cover Letter and Executive Summary Form

A cover letter shall be submitted on the Respondent's letterhead, signed by a principal and the joint venture partner, if applicable. The cover letter must contain a plan explaining how services will be performed; a commitment to provide the services described in the Scope of Services of this RFP; and indicate that the offer is good for one hundred-eighty (180) days from submittal of proposal. In the cover letter, the Respondent shall also include an acknowledgement that the Respondent has read and understands the requirements of the RFP including, but not limited to, the terms and conditions of the attached Professional Services Agreement (refer to Article IX), CHA's Diversity and Inclusion requirements, Insurance, and Indemnification requirements, and will comply with these requirements if awarded a contract. Proposers and Bidders shall also include the Executive Summary Form (Article X).

C. Qualifications and Experience

Selected Respondents shall meet the following minimum qualifications.

1. REQUIREMENTS

- a. The Respondent shall submit evidence of the firm's ability to perform the work as indicated by profiles of the principals and a description of the staff's professional and technical competence, for those principals and staff members who will be involved in the work requested herein.
- b. Respondents shall submit the resumes of the principals detailing each individual's education, technical training, and work experience. Respondents Proposal shall include the following information: (1) The name of the firm, (2) a description of the primary area of expertise of the firm. (3) the names of the firm's principal(s), (4) the address, telephone number and names of individuals to be contacted, (5) the size of the enterprise, (6) all of the firm's registration/license number(s) in Illinois, (7) the length of time the firm has worked in its area of expertise generally, and in Illinois, if different for a different length of time and (8) the firm may submit a general brochure of their work.
- c. The Respondent must describe its qualifications, resources, and experience as it pertains to the requested services. The Respondent must demonstrate it has the experience and capacity to complete all of the required services, whether they are conducted at the same time, or separately.
- d. The Selected Respondent shall comply with the Illinois Real Estate License Act of 2000.
<https://www.ilga.gov/legislation/ilcs/ilcs5.asp?ActID=1364&ChapterID=24>.

2. QUALIFICATIONS

Prior Housing Management Experience and Project History

- a. The Selected Respondent(s) or key personnel must be experienced in management and operation of residential property and, preferably, demonstrated success in managing and operating affordable and subsidized housing, such as Public Housing, Project-Based Vouchers, HUD Multifamily Affordable (e.g., Sections 202, 811), Low Income Housing Tax Credits, Project Based Rental Assistance (PBRA – HUD’s project-based Section 8) or other subsidized housing programs, which must be made clear in Respondent’s proposal(s).
- b. The key principals and staff of the Selected Respondent working under this contract should possess a minimum education of an undergraduate degree or a combination of education and experience in managing and operating residential rental properties including Public Housing, project-based vouchers (PBV), Low-Income Housing Tax Credit (LIHTC) properties, and/or other multi-family rental properties as applicable to the proposal package(s) being responded to.
- c. The Respondent should demonstrate a record of relevant experience performing assessments of comparable complexity for both public and private housing authorities.
- d. Respondent should have training and experience to evaluate building systems, health, and safety conditions, and physical and structural conditions, and to provide cost estimates for maintaining, rehabilitating, or improving deficiencies, using both traditional and Green principles.
- e. Respondents should describe their environmental expertise. As inspections may include environmental issues as well and must have any required licenses.

D. Approach/Work Plan

1. Respondent shall provide a narrative describing its approach and work plan and qualifications to the Scope of Services/Statement of Work. The proposal must include a written management and transition plan for each package being proposed that describes the approach to the services described in the Scope of Services/Statement of Work. This may include but is not limited to project management systems to be utilized, plans for effective communications including reporting tools, and specific approaches to technical problems that may lead to cost savings for the CHA.

Respondent must demonstrate in the management plan, understanding of the Scope of Services/Statement of Work and clearly articulate how Respondent will provide the required services as outlined in the Scope of Services/Statement of Work. Joint ventures shall clearly identify in the management plan, the roles and responsibilities of each party to the joint venture.

2. Staffing Plan - Respondent shall also include in their proposal package, a staffing plan that demonstrates how the Respondent will employ qualified staff in the appropriate fields needed to perform the Scope of Services/Statement of Work. The staffing plan should demonstrate a capacity to deliver services that meet CHA staffing obligations.
 - a. The Staffing Plan must include:
 - i. Organization/structure chart with key employees or job descriptions of those proposed to manage the properties within the specific sites;

- ii. Staffing plans must include resumes of key site staff. Site staff should not be used in multiple sites, unless that position is related to a function that will serve all sites; and
 - iii. Outline a proposed hiring timeline, if needed.
- b. Other considerations for the staffing plan:
- i. The Respondent's site staff must be certified in appropriate areas for the job, including but not limited to RIM, UPCS and Low-Income Housing Tax Credit Compliance systems and procedures. Demonstrate plan to ensure that all employees maintain proper formal and informal training necessary to perform the scope of services, including but not limited to:
 - a) Rent Calculation certification
 - b) UPCS Inspections certification
 - c) Certified Occupancy Specialist certification
 - d) Senior Housing Management certification (for senior housing management employees)
 - e) Public Housing Management certification (for public housing management employees)
 - f) Low Income Housing Tax Credit Management certification (for LIHTC management employees)
 - g) RAD PBV Management certification (for RAD/PBV management employees)
 - c. If a Respondent is planning to joint venture or subcontract with other companies, incorporate the relationship on the organization chart and provide letters of interest from those firms, the names and credentials of their principals and key personnel, and include their résumés along with evidence of any required licenses. The Respondent should describe the roles and responsibilities of their subcontractors, including the key personnel as they relate to the Scope of Services for the RFP. CHA reserves the right to refuse presented Key Personnel.
 - d. Respondent(s) must include proposed strategy to effectively communicate changes in their operation or processes with CHA.
 - e. As part of the transition process, the CHA encourages the awardee to consider the knowledge and work performance of current and existing PPM staff while making hiring decisions.
3. The Transition Plan - must include:

- a. An outline detailing the activities and personnel responsible for the transition of property management duties from the existing property management firm. The Transition Plan must detail how the Respondent proposes to ensure a smooth transition with minimal disruption to CHA residents during a thirty (30) to ninety (90) day transition period.
- b. A Quality Control Plan that documents how the Respondent(s) will monitor the quality of those processes to be executed by the Respondent(s). The Quality Control Plan must be developed in accordance with commercial standards and requirements, and must detail the processes, procedures, and metrics to be employed for assuring quality. The methods to conduct and report on periodic internal audits of the Respondent(s) own processes should be included as well.
- c. A narrative describing how the Respondent will provide customer service and provide specific performance metrics that will be achieved, implemented, and managed. The Respondent should also demonstrate an ability to effectively manage positive community relations.

E. Work History with CHA and other Local Public Agencies

Respondent must list and briefly describe any past work history with CHA and other Local Public Agencies, including the specific project worked on or the specific products delivered to CHA. The project descriptions shall include, at a minimum, the scope of work performed, the location, dollar value, and list the Respondent's key personnel on the project. For each project listed, the Respondent shall provide the client's name, the contact person and their title, address, and phone number. Indicate **N/A** if Respondent does not have any work history with CHA and other Local Public Agencies.

F. Past Performance

The Respondent must provide a minimum of three (3) and a maximum of five (5) project descriptions that best demonstrate the Respondent's ability to perform the work outlined in the Scope of Services including work performed for CHA as one of the projects identified. The Respondent shall include a maximum one-page narrative for each project description to address, at a minimum, the following:

1. The scope of work performed, the location, dollar value (awarded versus received or reimbursed), the cost per participant, and list the Respondent's key personnel on the project.
2. Demonstrated success in previous and current work and how that work relates to success on this project.
3. Description of the qualitative and quantitative outcomes related to each project, whether they met the contract benchmarks, and if applicable, why the benchmarks were or were not achieved.

4. Highlighted in each of the descriptions should be a summary of challenges encountered and how they were overcome.
5. Performance measures of the program's demonstrated ability to meet the indicators included in the proposal.

G. References

Proposers are required to provide at least three (3) references, excluding CHA, from within the past three (3) years for projects and areas of responsibility similar to those the Respondent desires to provide herein. Please include company name, contact person, mailing address, telephone number and email address. Please include a brief but detailed explanation of services provided and submit with your proposal. CHA will email any questions to the references included in your submission. Please inform your references that they will be contacted by CHA. (Attachment E)

H. Organization Structure and Key Personnel

1. The Respondent must provide the name and resume of the program executive that will be accountable for the CHA project. Key Personnel shall not be replaced without the prior written approval of CHA.
2. The Respondent must provide an organization/structure chart and include its key technical and consulting personnel who will be assigned to the CHA project team along with their resumes and provide the following information including, but not limited to:
 - i. Detail concerning each primary team member working with the Respondent, as well as those working in a subcontracting capacity. List all current projects that each primary team member may be working on during the term of the Contract, and indicate which team member will have primary responsibility for the CHA account;
 - ii. Correlation of team members to the tasks each will be performing;
 - iii. Describe previous, related experiences and projects (preferably public housing); and
 - iv. If Respondent proposes staff to work on the CHA account who are not located in a Chicago area office (within 25 miles of the city), indicate their office location.

I. Fee Proposal Form (refer to Attachment A)

Respondent must complete the Fee Proposal Form in its entirety and return it with this RFP package (refer to Attachment A). Respondents should complete the fee form for each package they are proposing to manage. The Proposed Monthly Management Fee Per Occupied Unit is the only field that respondents must input all other fields will calculate automatically.

J. Insurance Requirements

The Respondent must submit a current certificate of insurance in the form required by this RFP. At the time of contract award, the Selected Respondent shall be required to provide an updated certificate of insurance, and all required endorsements adding CHA and any other required party as an additional insured, meeting the CHA's minimum insurance requirements.

K. Joint Venture Agreement

Firms entering into a joint venture must submit a copy of its joint venture agreement and all required submittals must be signed by a principal of each joint venture partner including, but not limited to, subcontractors' information submittals, and MBE/WBE/DBE and Section 3 Utilization Plans. Indicate **N/A** if Respondent will not be part of a joint venture agreement.

L. Liens, Suits, Disputes, Defaults and Judgments

Respondents shall include a detailed description of any disputes they currently are involved in, as well as, a complete list of any lawsuits, disputes, defaults and judgments occurring within the last five (5) years, and all current liens, lawsuits, disputes, defaults, and judgments pending including Fair Housing claims, regulatory or tax credit violations. Indicate N/A if Respondent does not have any disputes, lawsuits, judgments, disputes, defaults or liens described above. Include defaults received on CHA contracts.

M. Audit Findings and Other Compliance Reports/Evaluations

Respondents shall submit to CHA's Department of Procurement and Contracts any third party reports or evaluations of Respondent's compliance with any applicable laws, rules, regulations, policies procedures, contract provisions, or requirements with respect to Respondent's performance of services similar in nature to those being solicited by this RFP in the past five years, including, but not limited to, any and all final findings made by an Office of the Inspector General ("OIG") or Internal Auditor (including those conducted by CHA's Inspector General and/or CHA's Internal Auditor) with respect to Respondent's performance of services, compliance with terms of a contract, findings in an Administrative or Internal Investigation, or any findings of failure to cooperate in an OIG inquiry or with Internal Auditors. Indicate **N/A** if Respondent does not have any findings described above.

N. Debarment Statement

Respondent shall submit a statement that the Respondent, its joint venture partner, if applicable, its subcontractors, vendors and staff are not debarred, suspended or otherwise prohibited from conducting business with any Federal, State or local agency.

O. Economic Disclosure Statement (Exhibit E)

Respondents must complete the attached economic disclosure statement and affidavit as referenced in the Attachments. The economic disclosure forms must be completed by the Respondent and all subcontractors in its entirety and notarized. Privately held firms and not-for-profit organizations must disclose the board of directors/corporate officers. All firms must disclose the percentage of ownership. Failure to provide complete ownership information may cause your response to be deemed non-responsive.

P. Financial Information

The Respondent/Financially Responsible Party shall demonstrate its financial responsibility by submitting the most recent two years of audited, reviewed or compiled financial statements prepared by a third party licensed Certified Public Accountant (CPA). Listed below are the minimum acceptable required documents based upon the amount of the procurement:

The Respondent must provide Financial Statements, which are compiled, reviewed and/or audited as defined below (which may be subject to different levels depending upon the Respondent's proposal and the projected contract value of the award), and which consist of:

- Accountant's Report
- Balance Sheet (last 2 years)
- Income Statement (last 2 years)
- Cash Flow Statement (last 2 years)
- Financial Statement Footnotes (if applicable)

For proposals or contracts awards valued at less than \$500,000, the Respondent must provide the IRS tax transcript.

For proposals or contract awards valued at less than \$1,000,000 the Respondent must provide complied financial statements.

For proposals or contract awards valued at less than \$2,500,000.00, the Respondent must provide reviewed financial statements.

For proposals or contract awards valued in excess of \$2,500,000.00, the Respondent must provide audited financial statements.

CHA will also evaluate the respondents based upon analysis of third-party reporting agencies, regulatory agencies, bureaus, etc., as it deems necessary to determine the financial adequacy of the respondent entity and confirm that the entity is in good financial standing with governmental agencies.

Other considerations in the evaluation of the financial condition of Respondents follow:

- Financial statements must be from a legal business entity (i.e., corporation, partnership, LLC, etc.). The entity name and address listed on the Financial Report should match the address on file with Dun & Bradstreet report in order for CHA to perform financial review.
- If respondent is not able to provide the Financials 6 months after their fiscal year end, respondents should provide the reason for delay or non-completion.
- Newly created entities (partnerships, LLC's, etc.) must provide financial statements from the entity's general partner and/or any other financially responsible entity that collectively can demonstrate the capability to complete the contract.
- Internally prepared business entity financial reports generated by the respondent will not be accepted.
- Personal financial statements or tax returns will not be accepted.
- CHA reserves the right to request Dun & Bradstreet reports in order to make an award determination. Vendors must provide the address on file with Dun & Bradstreet if it differs from the address listed on the proposal.

- CHA reserves the right to request additional information to complete the financial evaluation and review of any respondents.

Q. Diversity Goals

CHA values diversity, equity and inclusion and seeks vendors with similar share values. Refer to Article VIII for CHA’s Contract Requirements for additional detail. To enable CHA to assess this alignment, Respondent should answer the following questions and submit with their proposal (Limit responses to no more than 2 pages). **Any responses that exceed this page limit will not be considered as responsive.**

1. What is your organization's strategy for DEI?
2. What is the racial ethnicity of your Board and staff? What percentage resides Chicago?

JOB CLASSIFICATION	WHITE		BLACK		HISPANIC		OTHER	
	Male	Female	Male	Female	Male	Female	Male	Female
OFFICIALS								
CRAFT (SKILLED)								
LABORERS (UNSKILLED)								
CLERICAL								

3. Describe any opportunities, beyond the scope of services outlined within the proposal, for CHA residents including any internships, job shadowing, employment or mentorships.

R. Vendor Submission Checklist

Refer to Attachment C for all required submittal requirements. The following documents are exhibits to this RFP and can be found at www.thecha.org/doing-business:

- A. Contract Compliance Certification
- B. M/W/DBE/Section 3 Utilization Plan (UP)
- C. Letter of Intent-MWDBE and Section 3 Subs
- D. Waiver Request-M/W/DBE (If Applicable)
- E. Response to DEI Questions & Chart
- F. Submittal Requirements Checklist
- G. Contractor’s Affidavit
- H. Statement of Bidder’s Qualification
- I. Economic Disclosure Statement
- J. HUD Form 5370 or 5370-C

Proposals not containing all submittal requirements may be deemed Non-Responsive.

ARTICLE VI INSURANCE REQUIREMENTS

Prior to the commencement of this Agreement, Manager agrees to procure and maintain at all times during the Term of this Agreement, the types of insurance specified below in order to protect the CHA from the acts, omissions and negligence of Manager, its officers, officials, subcontractors, joint venturers, partners, agents or employees. The insurance carriers used by Manager must be authorized to conduct business in the State of Illinois and shall have an A.M. Best rating of not less than A- VII. The insurance provided shall cover all operations under the Agreement, whether performed by Manager or by its subcontractor, joint venturers, partners, agents, officers or employees. Proof of coverage shall be submitted to CHA in the form of a properly executed Certificate of Insurance and all applicable policy endorsements. The non-submission of this proof, or submission of proof that is not in compliance with Manager's obligations under this Agreement does not constitute a modification of the requirements of this Agreement, nor does it constitute approval of Manager's insurance policy or terms that not compliant with this Agreement, nor a waiver of CHA's rights, including, to seek compliance with Manager's obligations under the Agreement.

The CHA has established an owner-controlled insurance program called the Property Managers' Insurance Program, (PMIP). The program consists of general liability insurance policies and a self-insured retention (SIR) layer to protect the CHA and its Property Managers against operational risks associated with the management of the residential developments. General Liability claims reported under the PMIP will be administered by CHA's third-party administrator under the direction of CHA Risk Management.

General Liability Insurance coverage afforded under the PMIP is provided for the property management firms solely with respect to those activities which fall within the scope of their duties under the Professional Property Management Agreement.

Independent of the general liability policy procured pursuant to the PMIP, Manager is required to maintain, throughout the Term of the Agreement, at Manager's expense, the following coverages identified below, which are minimum requirements for this Agreement and in no way limit the indemnity covenants contained in this Agreement and in no way warrant the sufficiency of the protection needed by the Manager.

Professional Liability Insurance

Professional Liability Insurance covering acts, errors, or omissions shall be maintained with limits of not less than \$5,000,000 per occurrence. When policies are renewed or replaced, the policy retroactive date must coincide with, or precede, the start of Services under the Contract. A claims-made policy which is not renewed or replaced must have an extended reporting period of two (2) years.

General Liability Insurance

General Liability Insurance provided shall have a limit of not less than Two Million Dollars (\$2,000,000) per occurrence with an aggregate of not less than Four Million Dollars (\$4,000,000). The insurance policy is to include coverage for Bodily Injury and Property Damage, Contractual Liability, Products-Completed Operations, Personal & Advertising Injury. Policy shall name CHA as an additional insured and shall cover any acts of Manager outside the Scope of Services of the Private Management Agreement with CHA.

Sexual Abuse and Molestation

When services or activities are provided to minors on (or off) the Premises, Sexual Abuse and Molestation Insurance coverage shall be maintained with a limit of \$1,000,000 per occurrence (or an endorsement of the commercial general liability policy with a separate sublimit in this amount). CHA shall be included as an additional insured under the policy on a primary and non-contributory basis.

Auto Liability Insurance

If applicable, when any motor vehicles (owned, non-owned and hired), which are not owned by CHA, are used in connection with the Services to be performed, Manager shall provide Comprehensive Automobile Liability Insurance with limits of not less than \$1,000,000 per occurrence, Combined Single Limits, for bodily injury and property damage. The CHA shall be endorsed as an additional insured on Manager's policy on a primary and non-contributory basis.

Workers' Compensation and Employer's Liability

Coverage must be in accordance with the laws of the State of Illinois and endorsed with waiver of subrogation in favor of Chicago Housing Authority.

- Coverage A – Statutory Limits
- Coverage B - Employers Liability - \$500,000 bodily injury or disease each accident; each employee

Crime or Fidelity bond/policy which insures against losses resulting from dishonest or fraudulent acts committed by any employees or agents of Agent. The minimum limit maintained shall at least be equal to two (2) months' gross income from the Project with a maximum deductible of \$100,000.

Related Requirements

Manager is responsible for insuring its own real and personal property (including but not limited to material, equipment, tools and supplies owned, rented or used by Manager) and waives its rights of subrogation against Owner with respect to loss or damage to such property. Manager agrees to maintain throughout the Term of this Agreement any additional insurance policies necessary to provide coverage for any and all activities performed outside of the Statement of Work of the Private Management Agreement with Owner. Manager is responsible for assessing its own risks and maintaining higher limits or broader coverages where deemed appropriate.

Prior to commencing work at any of Owner's property, a Certificate of Insurance which evidences the required insurance coverages shall be emailed to the assigned CHA Procurement Specialist.

Certificate Holder: Chicago Housing Authority
60 E. Van Buren St.
Chicago, Illinois 60605

Additional Insureds: Collectively referred to as the "Additional Insureds" shall include Chicago Housing Authority, Chicago Housing Administration, LLC; and/or other Limited Liability Company as established by CHA; its respective commissioners, board members, officers, directors, agents, property management firms, construction management firms, agents, employees, vendors, invitees and visitors.

Renewal Certificates of Insurance or such similar evidence are to be emailed to the Procurement Specialist and to the Manager/Director of CHA's Risk Management department prior to expiration of insurance coverage. The receipt of any certificate does not constitute agreement by the CHA that the insurance requirements in the Agreement have been fully met or that the insurance policies indicated on the certificate are in compliance with the requirements of this Agreement. The insurance policies shall provide for thirty (30) days written notice to be given to the CHA in the event that coverage is substantially changed, canceled or non-renewed, other than if such cancellation is for non-payment of premium, in which case the insurance company shall endeavor to provide ten (10) days written notice to CHA.

If any of the required insurance is underwritten on a claims-made basis, the retroactive date shall be prior to or coincide with the date of this Agreement and the Certificate of Insurance shall state the coverage is "claims made" and, also, the retroactive date. Manager shall maintain coverage for the duration of this Agreement. Any extended reporting period premium (tail coverage) shall be paid by Manager. Upon request, Manager shall provide to CHA, annually, a certified copy of the insurance policies obtained pursuant hereto.

Note: Developments under the Tax Credit Housing portfolio may be subject to additional insurance requirements as stipulated by lenders and/or investors.

Subcontractors Insurance Requirements

Manager shall include the insurance requirements below in all subcontract agreements for work related to or performed on CHA Property. The insurance carriers used must be licensed to conduct business in the State of Illinois and shall have an A.M. Best rating of not less than A-VII. Under no circumstances shall work begin until insurance compliance has been met. It is the responsibility of the Manager to ensure all subcontractors carry, at a minimum, the following insurance:

Workers' Compensation and Employer's Liability

Coverage must be in accordance with the laws of the State of Illinois and endorsed with waiver of subrogation in favor of Chicago Housing Authority.

- Coverage A – Statutory Limits
- Coverage B - Employers Liability - \$500,000 bodily injury or disease each accident; each employee

General Liability Insurance

General Liability Insurance written on an occurrence form with limits of not less than One Million Dollars (\$1,000,000) per occurrence and aggregate of not less than Two Million Dollars (\$2,000,000). The insurance policy is to include coverage for Bodily Injury and Property Damage, Contractual Liability, Products-Completed Operations, Personal & Advertising Injury. Manager and CHA must be included as additional insureds on the subcontractor's policy and such insurance will be endorsed as primary and non-contributory with any other insurance available to Manager and/or CHA.

Sexual Abuse and Molestation Liability

When vendors will provide services or activities to minors on (or off) the Premises, Sexual Abuse and Molestation Insurance coverage shall be maintained with a limit of \$1,000,000 per occurrence (or an endorsement of the commercial general liability policy with a separate sublimit in this amount). Manager and CHA shall be endorsed as an additional insured on Manager's policy on a primary and non-contributory basis.

Automobile Liability Insurance

When any motor vehicles (owned, non-owned and hired) are used in connection with the Services to be performed, the subcontractor shall provide Comprehensive Automobile Liability Insurance with limits of not less than One Million Dollars (\$1,000,000) per occurrence Combined Single Limit, for bodily injury and property damage. Manager and CHA must be included as additional insureds on the subcontractor's policy on a primary and non-contributory basis.

Professional Liability

When any architects, engineers, construction Managers, elevator repair professionals, etc., perform work, Professional Liability insurance covering acts, errors or omissions shall be maintained with limits of not less than Five Million Dollars (\$5,000,000) per occurrence is required. When policies are renewed or replaced, the policy retroactive date must coincide with, or precede, the start of Services under this Agreement. A claims-made policy, which is not renewed or replaced, must have an extended reporting period of two (2) years.

Armed/Unarmed Security Professional Liability (E & O)

The insurance requirements under this Agreement shall be maintained in a separate Professional Liability Policy or as an adjunct to the General Liability Policy through endorsement. If the coverage is provided through an endorsement to the General Liability Policy a copy of the endorsement must be attached to the certificate. This insurance shall cover bodily injury, property damage, damage to property in Subcontractor's care, custody, and control, or personal injury arising out of the Subcontractor's wrongful act(s) in an amount of not less than Five Million Dollars (\$5,000,000) and include a Lost Key Coverage Endorsement if the firm will possess keys to the property. When policies are renewed or replaced, the policy retroactive date must coincide with, or precede, the start of services under this Agreement. A claims-made policy which is not renewed or replaced must have an extended reporting period of two (2) years.

The policy must waive any right of recovery a subcontractor or its insurer may have against Manager and/or CHA because of payments made for injuries or damages arising out of your ongoing operations of "your work" done under a contract with that person or organization.

Umbrella Liability coverage, if applicable, is to follow the form of the General Liability Insurance requirements outlined above.

Additional coverages or higher limits may be required depending on the Statement of Work.

SUBCONTRACTOR CERTIFICATES:

Certificate Holder: Manager's Corporate Name and Address

Additional Insureds: Collectively referred to as the "Additional Insureds" shall include Manager, Chicago Housing Authority, Chicago Housing Administration, LLC; and/or other Limited Liability Company as established by CHA; its respective commissioners, board members, officers, directors, agents, property management firms, construction management firms, agents, employees, vendors, invitees and visitors.

Primary Coverage: Subcontractor's insurance coverage shall be the primary policy. The Subcontractor/Vendor expressly understands and agrees that any

insurance or self-insurance programs maintained by the CHA shall apply in excess of and shall not contribute with insurance provided by the Subcontractor/Vendor.

Certificate shall include the title of the development name and address and project or service provided by the Subcontractor/Vendor.

CHA in no way warrants that the minimum limits contained herein are sufficient to protect the CHA from liabilities that might arise out of the performance of the work under this Agreement by the Subcontractor, Vendor, Contractor or Consultants. The Manager and/or Subcontractor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages. The Manager or any of its Subcontractors are not relieved of any liability or other obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain sufficient insurance.

Manager must collect and maintain their subcontractor's Certificates of Insurance and endorsements and make available to CHA Department of Procurement and Contracts, and the Risk Management department for review. Renewal Certificates are required prior to expiration of insurance coverage. At the CHA's option, non-compliance will result in one or more of the following actions: (1) Manager will be immediately removed from CHA property and the Agreement revoked; (2) all payments due Manager will be held until Manager has complied with the Contract; or (3) Manager will be assessed Five Hundred Dollars (\$500) for every day of non-compliance. The receipt of any Certificate of Insurance does not constitute agreement by the CHA that the insurance requirements in the Contract have been fully met or that the insurance policies indicated on the certificate are in compliance with the requirements of the Contract. The insurance policies shall provide for thirty (30) days written notice to be given to the CHA in the event coverage is substantially changed, canceled or non-renewed.

If the required insurance is underwritten on a claims-made basis, the retroactive date shall be prior to or coincident with the date of the Contract and the Certificate of Insurance shall state the coverage is "claims made" and also the retroactive date. Manager shall maintain coverage for the duration of the Contract. Any extended reporting period premium (tail coverage) shall be paid by Manager.

Upon request, Manager shall provide to the CHA, a certified copy of the insurance policies and endorsements obtained pursuant hereto. It is further agreed that Manager shall provide the CHA thirty (30) days written notice in the event of the occurrence of any of the following conditions: aggregate erosion in advance of the Retroactive Date, cancellation and/or non-renewal.

Manager shall require all subcontractors to carry the insurance required herein and any additional coverage deemed appropriate for the scope of work being performed. Evidence of subcontractor's coverage must be submitted to CHA upon request. Failure of Manager to require all subcontractors to carry the required insurance hereunder, or failure of such insurance to adequately name and/or endorse the Manager and CHA as additional insureds, will be considered a breach of the Agreement, will trigger Manager's indemnification obligations under Section 6.2 of the Agreement, and will not be covered under the PMIP.

Manager expressly understands and agrees that, any insurance programs maintained by the CHA shall apply in excess of and will not contribute to insurance provided by the Subcontractor under any Agreement.

ARTICLE VII EVALUATION PROCESS

Proposals will be scored on a (100) point scale by an evaluation committee scoring the technical criteria in accordance with the evaluation criteria set forth below, with CHA Diversity Goals scored by Compliance and Pricing scored by Procurement. Each Respondent must indicate its fees on the attached fee form. Fees must be reasonable and justifiable and must reflect the proposed approach/work plan, which is being evaluated under Article VII. CHA will make an award to the responsive and responsible Respondent whose proposal conforms to the solicitation and whose combined total score for price, compliance, technical factors and oral presentations provides the best value. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of CHA. CHA reserves the right to perform site visits that may be included in the evaluation scoring.

CHA will utilize a ratio method for scoring proposed fees. With this method, the proposal with the lowest price receives the maximum points allowed (10 points). All other proposals will receive a percentage of the points available based on their price relationship to the lowest. This is determined by applying the following formula:

$$(A/B) \times C = D$$

A—the lowest Respondent's price.

B—the Respondent's price being scored.

C—the maximum number of price points available. D—Respondent's pricing score (points).

Lowest proposed price divided by the Respondent's price times the maximum points allowed.

Example: The lowest proposed price is \$100,000. The next lowest proposal price is \$125,000. The maximum point total available for price is 10 points. The proposal with the \$100,000 price would receive 10 points (because it is the lowest of all proposals). Using the lowest proposal price as a base (or numerator), we would then divide the second lowest price by the first lowest price (denominator) and then multiply the result by the max point value (10) to determine the point value relative to the lowest price, as follows:

$$\$100,000/\$125,000 = 0.80$$

$$0.80 \times 10 = 8 \text{ (points)}$$

As such, the proposed price of \$125,000 would be awarded 8 points out of a maximum point value of 10.

Materials, information or explanations should be included in each Respondent's proposal, as required in Article V Submittal Requirements, and/or as otherwise necessary to allow the following evaluation criteria to be considered:

EXAMPLE EVALUATION CRITERIA

TECHNICAL EVALUATION CRITERIA	MAXIMUM POINTS
QUALIFICATIONS AND EXPERIENCE (TECHNICAL): 1. The Respondent shall describe its qualifications, resources and experience as it pertains to the Scope of Services/Statement of Work requested services. The Respondent shall demonstrate it has the	20

experience and capacity to complete all of the property management services as listed in the Scope of Services/Statement of Work, whether they are conducted at the same time, or separately. (20 points)	
PAST PERFORMANCE (TECHNICAL): 1. Respondent must provide a minimum of three (3) and a maximum of five (5) project descriptions that best demonstrate the Respondent's ability to perform the work outlined in the Scope of Services. The project descriptions shall include, at a minimum, the scope of work performed, the location, dollar value, and list the Respondent's key personnel on the project. The project descriptions must be relevant to the proposed package(s). <u>Performance on CHA contracts will be considered.</u> (20 points)	20
APPROACH/WORK PLAN (TECHNICAL): 1. Respondent's management plan clearly articulates how they will provide the required services as outlined in the Statement of Work relative to the package(s) proposed. (5 points) 2. Respondent's staffing plan for managing the properties within the package is specific, reasonable, and supports the proposed management plan and approach. (10 points) 3. Respondent's proposal clearly articulates how outstanding customer service will be achieved and demonstrates an ability to achieve positive community relations. (5 points) 4. Respondent's proposal clearly articulates the process, procedures, and metrics to be used to monitor the quality of those processes to be executed by the Respondent. (5 points) 5. Respondent's proposal clearly articulates how they plan to ensure a smooth transition to begin work with minimal disruption to residents. (5 points)	30
ORGANIZATION STRUCTURE AND KEY PERSONNEL (TECHNICAL): 1. Quality of the proposed Organization Chart and evidence that the key personnel assigned to perform the required services have adequate experience, licenses, accreditation, and other qualifications as required. (10 points)	10
MBE/WBE/DBE and SECTION 3 (TECHNICAL): 1. Demonstrated understanding and quality of the MBE/WBE/DBE Utilization Plan. (5 points) 2. Section 3: Demonstrated understanding of CHA's Section 3 Policy, and quality of Respondent's Section 3 Utilization Plan. (5 points)	10
PROPOSED FEE 1. Respondent's overall proposed fee for Private Property Management Services. (10 points)	10

After the evaluation committee has evaluated and scored the Respondents' proposals, the MBE/WBE/DBE and Section 3 Business Utilization Plans and the proposed fees have been evaluated and scored, CHA's Contracting Officer shall establish the competitive range. If deemed necessary for the purpose of efficiency and economy, CHA has the right to limit the number of Respondents in the competitive range. Respondents within the competitive range will be notified and unless otherwise indicated, will be required to participate in presentations/discussions with

CHA. CHA may also require further information or clarification from the Respondents in the competitive range regarding their proposals prior to the presentations/discussions.

CHA, however, reserves the right to make its decision to award a contract based solely on the written submitted Proposals without any requests for presentations, formal interviews, negotiations or further discussions.

The objective of the presentations/discussions is to answer questions, clarify issues, and/or provide additional information regarding a Respondent’s proposal and negotiate. Presentations will be evaluated according to the criteria established by the evaluation committee. Respondents in the competitive range will be scored on a maximum 30-point scale. The resulting points will be added to their written proposal scores for a total score.

ORAL PRESENTATION EVALUATION CRITERIA	MAXIMUM POINTS
TOTAL ORAL PRESENTATION POINTS	30

Following the presentations, the evaluation committee members will evaluate and summarize their findings for each firm that participates in the presentations, and the evaluation committee will submit scores to Procurement. CHA will make an award to the responsive and responsible Respondent(s) whose proposal conforms to the solicitation requirements and whose combined total score for price, compliance, technical factors and oral presentations provides the best value to CHA. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of CHA.

CHA reserves the right to reject any and all proposals and reserves the right to secure services solicited by this RFP by means of a non-competitive proposal process in accordance with §2 CFR 200.320 (c) or to re-solicit competitive proposals.

ARTICLE VIII DIVERSITY AND INCLUSION GOALS

In its procurement of goods and services, CHA seeks relationships with vendors who share our values for inclusive and equitable contracting opportunities. CHA values contract diversity and is committed to strengthening workforce development and economic opportunities for low-income workers, and Minority, Women, and Disadvantaged Business, including Section 3 Businesses.

1. Summary of Contract Requirements

Type of Contract	M/W/DBE	Section 3 (Labor Hours)	S3 Business subcontracting (> \$250,000)	Davis Bacon
Construction	Yes	Yes	Yes	Yes
Professional Service (licensure required)	Yes	No	Yes	No

Professional Service (non-licensure required)	Yes	Yes	Yes	No
Professional Services (direct services to residents)	Yes	Yes	No	No
Material & Supply	Yes	No	Yes	No

* if not self-performing

Minimum Thresholds for Contract Diversity:**Minority/Women/Disadvantaged Business Enterprises (M/W/DBEs)**

Certified Minority, Women, and Disadvantaged Business Enterprises (M/W/DBEs) shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with federal funds. Vendors and their subcontractors or suppliers must take all necessary and reasonable steps to ensure that M/W/DBEs have the maximum opportunity to compete for and perform contracts financed in whole or in part by federal funds. CHA establishes minimum **thresholds** for all contracts over \$50,001. The percentage is required for the entire project amount and not limited to CHA's funding. Vendors unable to meet the threshold requirement may propose indirect participation subject to CHA's written approval.

Section 3 Business Subcontracting – For contracts >\$250,000, vendors are required to subcontract to Section 3 Businesses, unless self-performing. CHA establishes minimum thresholds. To locate a Section 3 Business visit the [Workforce Opportunity Resource Center](#) (WORC) site. Professional Services that directly provide support services for CHA residents are not required to sub-contract to Section 3 Businesses but are encouraged to sub-contract when feasible. Vendors unable to meet the threshold requirement may propose /Other Economic Opportunities (OEO) participation subject to CHA's written approval. These may include, but are not limited to mentorship programs, internships, training, and employment opportunities for non-CHA funded projects, or payment into CHA's Workforce & Education Fund.

Section 3 Labor Hours

CHA supports HUD's Section 3 requirement which counts labor hours. All applicable contracts **require at least 25% of the labor hours** performed on a project are done so with Section 3 workers and businesses, of which 5% of those hours must be performed by Targeted Section 3 workers (i.e. CHA residents and HCV participants). Vendors will report these hours via B2Gnow and/or LCPTracker or through required affidavits based on the contract type (HUD Section 3 24 CFR part 75).

Davis Bacon and Minimum Wage Requirements:

The Davis-Bacon & Related Acts apply to construction contracts over **\$2,000** and ensures that all construction employees are paid under the US Department of Labor's wage decision. Union contractors must ensure that Davis-Bacon wages are met, in accordance with the contract.

All CHA contracts must comply with the current local Minimum Wage requirement. The Minimum Wage Requirements shall be specifically incorporated as a contractual requirement in any award and agreement resulting from this solicitation for any of the Selected Respondent's covered employees. The Respondent must consider the Minimum Wage Requirement in determining its fees for services to be performed or provided by the Respondent under its fee proposal and other submittals. Note that Federal wage determinations (either Davis-Bacon or HUD-Determined Wage Rates) preempt any conflicting State prevailing wage rate or the Minimum Wage Requirement when the State prevailing wage rate or the Minimum Wage Requirement is higher than the Federally imposed wage rate (24 CFR 965).

The following chart indicates the goals set by CHA for each type of contract.

Minimum Thresholds

Type of Contract	Contract Amount	MBE/WBE/DBE Participation	Section 3 Business Subcontracting (>\$250,000)	Section 3 Labor Hours (25% of which 5% is through CHA resident hires)***
Construction	\$50,001+	30%	10%	25%
Supply & Delivery	\$50,001 +	20%	3%*	N/A
Professional Services	\$50,001 +	20%	3%**	25%

*Or indirect **excludes direct support service providers *** Required regardless of contract amount

1. Utilization Plan:

This chart is a list of items needed to evaluate a full utilization Plan (UP). All respondents to CHA solicitations must submit a UP which enables CHA to evaluate how they will fulfill contract requirements.

Document Name	To be Completed By	Details
Utilization Plan (UP) M/W/DBE and Section 3 Businesses	Prime Contractor	This Excel worksheet will include all M/W/DBE and Section 3 Businesses subcontracting as well as proposed indirect, etc.
Letter of Intent	Each M/W/DBE and Section 3 subcontractor listed on the UP	If a Prime is a M/W/DBE and they are self-performing, they must submit a Letter of Intent. A Letter of Intent for each sub-contractor that is MWD/BE or Section 3

	including a self-performing Prime Contractor	Business must also be submitted. The information outlined in the UP must correspond with the Letters.
Letter of M/W/DBE Certification	Each M/W/DBE listed on UP, including a self-performing Prime Contractor	This form must be submitted with every UP and Letter of Intent and include current certification letters. Applications are not accepted.
Waiver Request-M/W/DBE	Prime Contractor	This form is only to be used if a vendor cannot meet their subcontracting requirements and all good-faith efforts, including indirect participation, have been exhausted. The form must include (1) the scope of work and (2) the reason the Prime cannot meet the commitments outlined.
Other Economic Opportunities (OEO)	Prime Contractor	If vendor is unable to subcontract to a Section 3 Business in full or in part they will need to propose indirect participation through the OEO section on the UP, or make commensurate payment upfront into the Workforce and Education Fund, subject to approval by CHA.
Contract Compliance Certification	Prime Contractor	Acknowledgment by the Vendor of their understanding of the CHA's diversity and inclusion contract requirements.

2. Reporting Requirements:

Contract Requirement	System	Details
Construction Contracts	LCPtracker	Certified Payroll Reports must be entered into LCPtracker weekly. This system also tracks compliance with Davis Bacon and Section 3 hours.
Professional Services	B2GNow	Payments must be entered into B2Gnow for every pay application monthly. This system tracks and verifies Prime and Subcontractor payments made and received.

Additional Information:

(a) COUNTING M/W/DBE AND SECTION 3 BUSINESS (S3B) CREDIT: A business that is both self-identified /certified as a Section 3 Business and certified as a M/W/DBE will count towards subcontracting requirements for both the M/W/DBE and Section 3 sub-contracting requirements.

(b) PROVIDING OPPORTUNITIES TO SECTION 3 WORKERS: In accordance with 24 CFR part 75.9, Prime and sub-contractors (including Section 3 Businesses) on CHA/HUD-funded contracts must ensure that Section 3 workers are provided economic opportunities with the following preference when applicable: a) residents of the project where the assistance is being

provided; b) residents of other public housing or Section 8; c) Youthbuild participants; and d) resident of the metropolitan area.

(c) **SUBSTITUTION/REMOVAL OF SUBCONTRACTOR:** A prime contractor that needs to remove or substitute a subcontractor on its approved utilization plan must submit a written request for the removal or substitution of the subcontractor concerned. Only when Department of Procurement and Contracts (DPC) approves such a request in writing can the removal or substitution of the subcontractor be done by the prime contractor. Under no circumstance should a prime contractor unilaterally remove or substitute a subcontractor on its CHA/HUD-funded contract without prior approval by DPC.

Definitions

Section 3 Business are defined a business that either is a) 51% owned by public housing or housing choice voucher participant(s); b) 51% owned by a low-income person(s); or c) 75% of the labor hours are performed by low-income workers.

Davis-Bacon and Related Acts directs the US Department of Labor to determine prevailing wage for construction projects.

Indirect Participation refers to the value of payments made to MWD/BE firms for work that is done outside of the proposed project or commensurate value to S3 Business or CHA residents/participants in other economic opportunities.

Other Economic Opportunities (OEO) defined:

Additional information on CHA's contract requirements and forms can be found at www.thecha.org/doing-business.

ARTICLE IX STANDARD PROFESSIONAL SERVICES AGREEMENT

Upon the award of a contract, the Selected Respondent(s) will execute CHA's Professional Services Agreement in substantially the same form with the same terms and conditions as set forth in the attached Agreement. A Respondent shall include, as part of its cover letter for its proposal to CHA, an acknowledgement that it has read, understands and accepts the terms and conditions of the Agreement. **If there are any terms and conditions to which the Respondent has objections, such objections and the specific section numbers must be noted in the cover letter. Any proposed alternative language should also be redlined on Attachment D. These revision request will be taken into consideration when determining a Respondent's responsiveness to the RFP.** A Respondent who fails to provide objections and propose alternative language shall waive its right to subsequently object to any terms of the agreement if awarded a contract by CHA (refer to Attachment D).

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ARTICLE X EXECUTIVE SUMMARY FORM

A. The undersigned, hereby acknowledges having received a full set of the Request for Proposal (RFP) Event # 3270.

B. The undersigned proposes, in accordance with all terms of the contract documents of which this proposal is a part, to perform all services in accordance with the terms and conditions specified herein. The proposer also agrees that this proposal to offer services to CHA will remain in effect for one hundred eighty (180) days from the date on which proposals are due unless a written letter of withdrawal is submitted to CHA Contracting Officer prior to the award of the contract.

C. All prices quoted herein shall remain firm for the period of this contract and shall not increase during the initial term of the contract.

D. Company's Name: _____

Address: _____

City, State, Zip Code: _____

I do solemnly declare and affirm under penalty of perjury that the contents of the forgoing documents are true and correct, and that I am authorized, on behalf of the firm, to commit to this proposal.

Name of Preparer (print) Title

Signature Date

Attesting Signer's name (required for corporations) Title

Attesting Signature (required for corporations) Title

Contact Person's Name and Title

Telephone Number Fax Number

Email Address

Note: Executive Summary Sheet must be completed, or Proposal may be deemed non-responsive. Rubber-stamped or typed signatures will disqualify your proposal.

**ATTACHMENT B
LETTER OF INTENT TO SUBMIT A PROPOSAL
REQUEST FOR PROPOSALS (RFP) EVENT # 3270
Professional Property Management Services
Property and Asset Management**

I, _____, the undersigned being a duly authorized official of _____ hereby acknowledges receipt of the above referenced RFP offering and certify the intent of this firm to submit a Proposal in response to the Request.

PLEASE EXECUTE AND SUBMIT THIS FORM THE SUPPLIER PORTAL AT [HTTPS://SUPPLIER.THECHA.ORG](https://supplier.thecha.org). NO LATER THAN Wednesday, March, 5, 2025, at 10:00 A.M. CST.

FIRM'S NAME:

ADDRESS:

CITY: _____ **STATE:** _____ **ZIPCODE:** _____

TELEPHONE: _____ **WEBSITE:** _____

PRINCIPAL CONTACT: _____ **TITLE:** _____

SIGNATURE: _____ **DATE:** _____

DIRECT PHONE: _____ **EMAIL:** _____