



Lorain Metropolitan Housing Authority

REQUEST FOR PROPOSALS

No. P24003

Grant Writing, Planning, and Consulting Services

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INTRODUCTION

The Lorain Metropolitan Housing Authority (hereinafter, “the Agency”) is a public entity that was formed in 1938 to provide federally subsidized housing and housing assistance to low-income families, within the County of Lorain, OH. The Agency is headed by a Chief Executive Officer (CEO) and is governed by a five-person board of commissioners and is subject to the requirements of Title 24 of the Code of Federal Regulations (hereinafter, “CFR”) and the Agency’s procurement policy.

Currently, the Agency (a) maintains and manages 1,394 public housing units, including 80 scattered sites, 200 Section 8 new construction units, 51 low-income housing tax credit units, and 11 market rate units, all located in Lorain, Elyria, Amherst, Oberlin, and Sheffield Township. The Agency currently has approximately 109 employees. LMHA is the Lead Grantee in a Choice Neighborhood Planning Grant for the Southside Gardens Development and Southside Gateway Neighborhood awarded in December 2022. Grant activities will be complete in December 2024. LMHA intends to apply for a Choice Neighborhood Implementation Grant for the Southside Gateway Neighborhood. LMHA may apply for other Choice Neighborhood opportunities.

In addition to the provision of housing and housing assistance to low-income families, LMHA acting through instrumentalities and single asset entities is exploring opportunities to expand, redevelop and sustain public housing assets via HUD’s Rental Assistance Demonstration program (RAD) conversion and public/private partnerships. The instrumentalities will be established as not-for-profit enterprises and the single asset entities will be considered affiliates. Both LMHA and the not-for-profit enterprises will be used for acquisition and development of affordable, workforce, and market rate housing units.

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RFP INFORMATION AT A GLANCE

[Table No. 2]

<p>AGENCY CONTACT PERSON (NOTE: Unless otherwise specified, any reference herein to “Contracting Officer” or “(CO)” shall be a reference to Ms. McCall.)</p>	<p>Sarah Karpinski, Director of Development and Procurement Telephone: 440-288-7499 E-mail: procurement@lmha.org TDD/TTY: 800-750-0750</p>
<p>HOW TO OBTAIN THE RFP DOCUMENTS</p>	<ol style="list-style-type: none"> 1. Access ha.internationaleprocurement.com (no “www”). 2. Click on the “Login” button in the upper left side. 3. Follow the listed directions. 4. If you have any problems in accessing or registering on the eProcurement Marketplace, please call customer support at (866)526-9266.
<p>PRE-PROPOSAL CONFERENCE</p>	<p>NONE SCHEDULED</p>
<p>QUESTION SUBMITTAL DEADLINE</p>	<p>Friday, April 15, 2024 at 3:00 PM</p>
<p>HOW TO FULLY RESPOND TO THIS RFP BY SUBMITTING A PROPOSAL SUBMITTAL</p>	<ol style="list-style-type: none"> 1. As directed within Section 3.2.1 of the RFP document, submit proposed pricing, where provided for within the eProcurement Marketplace only. 2. As instructed within Section 3.0 of the RFP document, submit 3 copies of your “hard copy” sealed proposal to the Agency Administrative Office.
<p>PROPOSAL SUBMITAL RETURN & DEADLINE</p>	<p>*April 29, 2024, 3:00 PM ET 1600 Kansas Avenue, Lorain, OH 44052 (*The proposed costs must be in the sealed “hard copy” proposal documentation must be received in-hand and time-stamped by the Agency by no later than 3:00 PM ET on this date).</p>

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- 1.0 THE AGENCY'S RESERVATION OF RIGHTS.** The Agency reserves the right to:
- 1.1 Right to Reject, Waive, or Terminate the RFP.** Reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the Agency to be in its best interests.
 - 1.2 Right to Not Award.** Not to award a contract pursuant to this RFP.
 - 1.3 Right to Terminate.** Terminate a contract awarded pursuant to this RFP, at any time for its convenience upon 10 days written notice to the successful proposer(s).
 - 1.4 Right to Determine Time and Location.** Determine the days, hours, and locations that the successful proposer(s) shall provide the services called for in this RFP.
 - 1.5 Right to Retain Proposals.** Retain all proposals submitted and to not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the Agency Contracting Officer (CO).
 - 1.6 Right to Negotiate.** Negotiate the fees proposed by the proposer entity.
 - 1.7 Right to Reject Any Proposal.** Reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
 - 1.8 No Obligation to Compensate.** Have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
 - 1.9 Right to Prohibit.** At any time during the RFP or contract process to prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the eProcurement Marketplace (hereinafter also "the Marketplace") and by downloading this document, each prospective proposer is thereby agreeing to abide by all terms and conditions listed within this document and within the Marketplace, and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the Agency that he/she feels needs to be addressed. Failure to abide by this time-frame shall relieve the Agency, but not the prospective proposer, of any responsibility pertaining to such an issue.
 - 1.10 Right to Reject - Obtaining Competitive Solicitation Documents.** The eProcurement Marketplace is the only official and appropriate venue to obtain the RFP documents (and any other information pertaining to this RFP such as addenda). Accordingly, by submitting a response to this RFP the respondent thereby affirms that he/she obtained all information on the Marketplace. Any other group such as an association or a proposal depository that informs potential respondents of the availability of such competitive solicitations are hereby instructed to not distribute these documents to any such potential respondents, but to instruct the potential respondents to visit the Marketplace to obtain the documents. The Agency will reject without consideration any response submitted from a firm that has not obtained the documents from the Marketplace.

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2.0 SCOPE OF WORK/TECHNICAL SPECIFICATIONS. The Agency is seeking proposals from qualified, licensed, and insured entities to provide services, that shall include, but are not limited to, Grant Writing, Planning, and Consulting Services. Planning and Consulting Services may include evaluation, planning, community engagement, urban design, architectural and engineering, and related services for real estate development and neighborhood investments.

2.1 Scope for Grant Writing Services. Grant Writing Services to include all services necessary to prepare and submit grant applications.

2.1.1 Choice Implementation Grant application for Southside Gateway Community.

2.1.1.1 Southside Gardens (SSG) is the Public Housing Development at the Center of the Southside Gateway Neighborhood. Southside Gardens was built in the early 1970's in a federally funded Urban Renewal project area. It is a desirable family development consistently demonstrating a 97% or greater occupancy rate. A 2008, Physical Needs Assessment (PNA) was last updated in 2012. At that time SSG development was considered functionally obsolete. On February 28, 2011, a 500-year storm caused flooding in South Lorain. At Southside Gardens forty-two (42) unit basements were seriously flooded with rainwater and sewage causing resident evacuation. Water rose to the level of basement light switches. In 2023 a second 500-year storm again caused widespread flooding in South Lorain SSG is bounded by RT. 57 (E.28th St to the North, Globe Avenue to the East, E. 31st. St. to the South, and Fulton Avenue to the West. The immediate surrounding area contains some new single-family homes, landmark church buildings, social service agencies, as well as decaying commercial and industrial buildings. The PNA noted that the deteriorated commercial and industrial uses in the vicinity "negatively impact" the public housing development.

2.1.2 Choice Neighborhood Grant Opportunities

2.1.2.1 LMHA is considering applying for other Choice Neighborhood Grants, including planning and implementation, for other LMHA properties.

2.1.3 General Grant Opportunities

2.1.3.1 LMHA intends to pursue other grant opportunities including federal, state, local, and philanthropic funding.

2.2 Scope for Work Planning Services

2.2.1 Services may include but are not limited to Program Management/Planning Coordination including:

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- 2.2.1.1 Assist in the development of a Master Plan
- 2.2.1.2 Develop, oversee, and facilitate a community engagement process
- 2.2.1.3 Community outreach and needs assessment
- 2.2.1.4 Development of urban design concepts
- 2.2.1.5 Development of architectural and engineering concepts
- 2.2.1.6 Development of Landscape Architecture/Open Space Planning
- 2.2.1.7 Assist in development of market and economic analyses for housing and commercial uses
- 2.2.1.8 Financial modeling
- 2.2.1.9 Other related services as assigned.

2.3 Scope of Work for Consulting Services.

- 2.3.1 Consulting Services related to Grant Writing and General Planning as requested by LMHA.

2.4 Preceding List is Not All-Inclusive. Please note that the preceding is not intended to be an all-inclusive listing of all the grant writing and general planning issues that the Agency may retain the successful proposer to provide but is intended to be a representative listing of issues the Agency may require.

2.5 LMHA will award a Master Co-Developer Contract under Request for Qualifications No. Q24001. Successful proposers are required to work with LMHA's selected Master Co-Developer.

2.6 Pool of Contractors. The Authority intends to create an inventory (or "pool") of Firms to provide services. The Pool will consist of various Firms which will be available on an as-needed basis to provide Services as requested by the Authority and the actual number of participants chosen will depend on the number of qualified proposals received.

- 2.6.1 Proposers selected to participate in the Pool will be assigned work at the discretion of the Authority taking into consideration the quality of work, availability, manpower, timelines, and other items of importance. The Authority will attempt to match each assignment to the firm best suited for a given project, which will be determined at the sole discretion of the Authority. The Authority will also determine the number of projects any firm will be assigned at any given time or duration. Upon such determination, the Authority will negotiate the specific work to be

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performed and the not-to-exceed cost based on the hourly rates awarded. If a satisfactory negotiation cannot be reached, the Authority reserves the right to discontinue negotiation and negotiate the work with another qualified firm from the pool. Each firm will serve in the Pool for a period of one (1) year with the option, at the Authority's sole discretion, to extend the contract for up to an additional four years for a maximum total of five years. The firm(s) selected by the Authority will be required to follow the Authority policies as specified in this RFP, the Performance Based Contract and subsequent task orders.

2.6.2 Assignment of Work

2.6.2.1 Services will be requested of the selected Firm(s) by LMHA on a Task Order basis. Task Orders are specific work assignments performed by the selected Firms(s) awarded a contract based on this RFP. The work assignments will cover one or more areas as outlined above.

2.6.2.2 LMHA may request that the successful proposer(s) and LMHA agree on a defined Scope of Work, a schedule, and an estimate of legal fees and expenses anticipated to be incurred in connection with particular assignments. LMHA may require the Firm to perform certain work on the basis of such Scopes of Work, schedules, and estimates, and to seek LMHA approval to perform work beyond such estimated based upon adequate justification. In appropriate circumstances, LMHA may request a written strategic proposal. Such proposals may include a description of the options and alternatives with an assessment of their worth, the major steps likely to be involved, their timing and sequence, and the projected costs associated with each step. Once proposals are agreed upon by LMHA and the Firm, any material variance from the estimate or proposal must be approved in advance by LMHA.

2.6.2.3 All Task Orders are subject to the terms and conditions of the resultant contract. In the event of a conflict between a Task Order and the contract, the contract shall prevail.

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2.7 Agency Programs

[Table No. 3]

LMHA Portfolio		Addresses
Public Housing	Lorain County OH	Total Public Housing Units: 1438
Public Housing	Lorain, OH	Amp 1 - Leavitt Homes 2153 Lorain Drive, 198 units; Westgate Apartments 2310 West 20 th Street, 12 units; Westview Terrace 2218 West 24 th Street, 142 units; 8 Scattered Sites
Public Housing	Lorain, OH	AMP 2 - John F. Kennedy Plaza 1730 Broadway Avenue, 177 units and 32 cottages; Lakeview Plaza 310 Seventh Street, 210 units; 10 Scattered Sites
Public Housing	Elyria, OH	AMP 3 - Wilkes Villa 104 Loudon Court, 172 units; Riverview Plaza 310 East Avenue, 181 units; 19 Scattered Sites
Public Housing	Lorain, OH	AMP 4 - Southside Gardens 3010 Vine Avenue, 108 units and 25 Scattered Sites
Public Housing/ LIHTC	Oberlin, OH	AMP 4 - J.F. Oberlin High Rise /LMHA Inc. 138 South Main Street, 102 units
Public Housing	Amherst, OH	AMP 4 - Albright Terrace 129 Milan Avenue, 50 units
Public Housing	Elyria, OH	AMP 4 - 18 Scattered Sites
Section 8 New Construction	Elyria, OH	Lorain County Elderly Housing Corporation (LCEHC) - Harr Plaza 15 Chestnut Street, 100 units
Section 8 New Construction	Lorain, OH	LCEHC - International Plaza 1825 Homewood Drive, 100 units; Veranda Rose 1963 Leavitt Road, 7 units
Market Rate	Lorain, OH	Veranda Rose 1963 Leavitt Road, 7 units

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3.0 PROPOSAL FORMAT

3.1 Tabbed Proposal Submittal. The Agency intends to retain the successful proposer pursuant to a “Best Value” basis, not a “Low Proposal” basis (“Best Value,” in that the Agency will, as detailed within the following Section 4.0, consider factors other than cost in making the award decision). Therefore, so that the Agency can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted following. Each category must be separated by numbered index dividers (which number extends so that each tab can be located without opening the proposal) and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement the Agency has published herein or has issued by addendum.

[Table No. 3]

(1) RFP Section	(2) Tab No.	(3) Description
3.1.1	1	Form of Proposal. This Form is attached hereto as Attachment A to this RFP document. This 2-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.1.2	2	HUD forms are provided as Attachment B to this RFP document. <ul style="list-style-type: none"> • Form HUD 5369-C Certifications and Representations of Proposers, Non-Construction Contract • Form HUD 2922 Certification Regarding Debarment and Suspension • Form HUD 50071 Certification of Payments to Influence Federal Transactions • Standard Form LLL Disclosure Form to Report Lobbying (if required per HUD 50071)
3.1.3	3	Profile of Firm Form. The Profile of Firm Form is provided as Attachment C to this RFP document. This 2-page Form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
3.1.4	4	Proposed Services. The proposer shall place under this tab documentation further explaining the proposer’s services and showing how the proposer intends to fulfill the requirements of the preceding Section 2.0 herein.
3.1.4.1		As detailed within Section 4.1, Evaluation Factor No. 2, herein, the proposer’s DEMONSTRATED UNDERSTANDING of the AGENCY’S REQUIREMENTS.
3.1.4.2		As detailed within Section 4.1, Evaluation Factor No. 3, herein, the APPROPRIATENESS of the TECHNICAL APPROACH and the QUALITY of the SERVICES PROPOSED.
3.1.4.3		As detailed within Section 4.1, Evaluation Factor No. 4, herein, the proposer’s TECHNICAL CAPABILITIES (in terms of personnel) and the

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		MANAGEMENT PLAN (including the ability to provide the services detailed herein).
3.1.4.4		As detailed within Section 4.1, Evaluation Factor No. 5, herein, the proposer's DEMONSTRATED EXPERIENCE in performing similar work and the proposer's DEMONSTRATED SUCCESSFUL PAST PERFORMANCE (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
3.1.4.5		If appropriate, how staff are retained, screened, trained, and monitored.
3.1.4.6		The proposed quality control program.
3.1.4.7		An explanation and copies of forms that will be used and reports that will be submitted and the method of delivery of such reports (i.e. Drop Box, ShareFile, etc.).
3.1.4.8		A complete description of the products and services the firm provides.
3.1.4.9		Proposed Engagement Letter. Please note that the Agency WILL NOT accept this engagement letter as the eventual contract but will consider including the proposed engagement letter as an appendix to the contract that is executed. The Agency retains the right to (and most likely will) require certain revisions to the engagement letter.
3.1.5	5	Managerial Capacity/Financial Viability/Staffing Plan. Proposer must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including professional resumes for the persons identified within areas (5) and (6) of Attachment C, Profile of Firm Form. Such information shall include the proposer's current organizational chart.
3.1.6	6	Client Information. The proposer shall submit a listing of former or current clients (at least 5), including any other Public Housing Authority, for whom the proposer has performed similar or like services to those being proposed herein. It is reasonable to assume the Authority will contact references. The listing shall, at a minimum, include:
3.1.6.1		The client's name;
3.1.6.2		The client's contact name;
3.1.6.3		The client's telephone number and email address; and
3.1.6.4		A brief narrative description and scope of the service(s) and the dates the services were provided, including a brief narrative description of those specific services including scope; size; cost; principal elements and special features.

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3.1.7	7	Equal Employment Opportunity/Supplier Diversity. The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within Section 3.5 herein pertaining to supplier diversity (i.e., small, minority-, and women-owned businesses).
3.1.8	8	Subcontractor/Joint Venture Information (Optional Item). The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Such Joint Venture firms or any major subcontractors (“major,” meaning a projected 10% or more of the work). At a minimum, the following forms must be submitted for the subcontractor: <ul style="list-style-type: none"> • Contractor’s business name, contact name, address, email address, phone number • HUD Packet of forms • Licensing and Insurance • Label forms clearly to indicate whether they are for the contractor or subcontractor.
3.1.9	9	Other Information (Optional Item). The proposer may include any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.
3.1.10	10	No Information Placed under a Tab. If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." DO NOT eliminate any of the tabs.
3.1.11	11	Proposal Submittal Binding Method. It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e. “comb-type;” etc.) or remove the pages from the cover (i.e. 3-ring binder; etc.) to make copies, and then conveniently return the proposal submittal to its original condition

3.2 Entry of Proposed Fees.

3.2.1 Pricing Items. The proposed fees (Pricing Items) shall be submitted on the attached Fee Submission Form in a separate sealed envelope. Unless otherwise stated, the proposed fees are all-inclusive of all related costs that the successful proposer will incur to provide the noted services, including, but not limited to: employee wages and benefits; clerical support; overhead; profit; licensing; insurance; materials; supplies; tools; equipment; long distance telephone calls; travel expenses; document copying not specifically otherwise agreed to by the Agency; etc. NOTE: the Agency will enter into a fixed rate for each Task.

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3.3 Additional Information Pertaining to the Pricing Items.

3.3.1 Fee Submission Form. Proposers must enter a realistic and reasonable proposed cost for all Pricing Items. Whereas no additional proposed costs can or will be received after the proposal submittal deadline, any proposer that does not, in the opinion of the Agency, comply with this requirement may be rejected without further consideration.

3.3.1.1 No Post-submittal Deadline Corrections Allowed. The Agency WILL NOT, after the submittal deadline, negotiate an increase to any unit costs or fees proposed prior to the submittal deadline; accordingly, proposers are strongly cautioned to submit a realistic price for the Pricing Items identified within the preceding Table No. 4 herein.

3.3.1.2 No Deposits/No Retainer. The Agency will NOT pay any deposits or retainer fees as a result of award of the ensuing contract (such is not allowed per relevant HUD regulation). This means that the Agency will pay the successful proposer(s) for actual services provided only. For services billed at the hourly rate (as detailed within the preceding explanations pertaining to Pricing Item No. 4), the Contractor will be required to submit a full back-up detail of all hours worked, listed by no more than the “15-minute” standard.

3.3.2 Potential Escalation of Rates. There shall be NO escalation of proposed rates allowed during the performance of these services.

3.3.3 Prior Agency Approval Required. Please note that the Contractor shall NOT conduct any additional work without the prior written authorization of the Agency representative (via delivery of a Task Order, which may take the form of an email). Failure to abide by this directive shall release the Agency of any obligation to pay the Contractor for any work conducted without the noted prior written authorization.

3.3.4 Overtime. Pursuant to the Contract Work Hours and Safety Standards Act, overtime shall be not less than time and one half for hours worked in excess of 40 hours per week. The Agency shall consider regular time to be Monday-Friday (excluding holidays), 8:00 AM - 5:00 PM. Accordingly, the Agency will pay a rate of 1.5 of the listed hourly rates herein for any work the Agency requires the successful proposer to work specifically during non-regular-time hours; however:

3.3.4.1 The Agency shall NOT be responsible to pay the successful proposer for any work that the successful proposer CHOOSES to work during non-regular-time hours; meaning, if the necessity for the work “after hours” is due to the Contractor’s lack of staffing or if such work is to support any of the work the Agency expects

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that such work will be provided during normal work hours. The exception to this shall be if a “non-normal” action by the Agency or an “Act of God” causes the Contractor to work “after hours” to solve the problem, then aforementioned over-time rule shall apply. All such overtime work must be pre-approved in writing by the Agency.

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

Lorain Metropolitan Housing Authority
Attention: Sarah Karpinski
Director of Development and Procurement
1600 Kansas Avenue, Lorain, OH 44052
procurement@lmha.org

- 3.4.1 Electronic Version.** In addition to an original and two hard copies of the submission an electronic copy should be included. The electronic copy should include at least two files: one for the proposal and one for the fee information. However, the proposal may be in more than one electronic file. Proposals received after the published deadline will not be accepted.
- 3.4.2 Labeling Proposal Package.** The package exterior must clearly denote the above noted RFP number and must have the proposer’s name and return address. Proposals received after the published deadline will not be accepted.
- 3.4.3 Submission Conditions.** DO NOT FOLD OR MAKE ANY ADDITIONAL MARKS, NOTATIONS OR REQUIREMENTS ON THE DOCUMENTS TO BE SUBMITTED! Proposers are not allowed to change any requirements or forms contained herein, either by making or entering onto these documents or the documents submitted any revisions or additions; and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to the Agency by the proposer, such may invalidate that proposal. If, after accepting such a proposal, the Agency decides that any such entry does not changed the intent of the proposal that the Agency intended to receive, the Agency may accept the proposal and the proposal shall be considered by the Agency as if those additional marks, notations or requirements were not entered on such. By accessing the eProcurement Marketplace, registering and downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.
- 3.4.4 Submission Responsibilities.** It shall be the responsibility of each proposer to be aware of and to abide by all dates, times, conditions, requirements

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and specifications set forth within all applicable documents issued by the Agency, including the RFP document, the documents listed within the following Section 3.8, and any addenda and required attachments submitted by the proposer. By virtue of completing, signing and submitting the completed documents, the proposer is stating his/her agreement to comply with the all conditions and requirements set forth within those documents. Written notice from the proposer not authorized in writing by the CO to exclude any of the Agency requirements contained within the documents may cause that proposer to not be considered for award.

3.5 Proposer's Responsibilities – Contact with the Agency. It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the designated CO only. Proposers must not make inquiry or communicate with any other Agency staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may be cause for the Agency to not consider a proposal submittal received from any proposer who may Agency not abided by this directive.

3.5.1 Addenda. All questions and requests for information must be addressed in writing to the CO. The CO anticipates that it will respond to all such inquiries in writing by addendum to all prospective proposers (i.e., firms or individuals that have obtained the RFP Documents). During the RFP solicitation process, the CO will NOT conduct any *ex parte* (a substantive conversation—“substantive” meaning, when decisions pertaining to the RFP are made—between the Agency and a prospective proposer when other prospective proposers are not present) conversations that may give one prospective proposer an advantage over other prospective proposers. This does not mean that prospective proposers may not call the CO—it simply means that, other than making replies to direct the prospective proposer where his/her answer Agency already been issued within the solicitation documents, the CO may not respond to the prospective proposer’s inquiries but will direct him/her to submit such inquiry in writing so that the CO may more fairly respond to all prospective proposers in writing by addendum.

3.6 Proposer's Responsibilities – Equal Employment Opportunity and Supplier Diversity. Both the Contractor and the Agency have, pursuant to HUD regulation, certain responsibilities pertaining to the hiring and retention of personnel and subcontractors.

3.6.1 Within 2 CFR §200.321 it states:

3.6.1.1 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

3.6.1.2 (a) The Non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

3.6.1.3 (2) Affirmative steps must include:

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- 3.6.1.3.1 (1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists; and,
- 3.6.1.3.2 (2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources; and,
- 3.6.1.3.3 (3) Dividing total requirements, when economically feasible, into smaller purchases or quantities to permit maximum participation by small and minority business, and women's business enterprises; and,
- 3.6.1.3.4 (4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority business, and women's business enterprises; and,
- 3.6.1.3.5 (5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and,
- 3.6.1.3.6 (6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

3.6.2 Within HUD Procurement Handbook 7460.8 REV 2 it states:

- 3.6.2.1 **Section 15.5.A, Required Efforts.** Consistent with Presidential Orders 11625, 12138, and 12432, the [Agency] shall make every effort to ensure that small businesses, MBEs, WBEs, and labor surplus area businesses participate in [Agency] contracting.
- 3.6.2.2 **Section 15.5.B, Goals.** [The Agency] is encouraged to establish goals by which they can measure the effectiveness of their efforts in implementing programs in support of . . . contracting with disadvantaged firms. It is important to ensure that the means used to establish these goals do not have the effect of limiting competition and should not be used as mandatory set-aside or quota, except as may otherwise be expressly authorized in regulation or statute. Some localities have adopted minority contracting set-aside policies or geographic limitations, which may be in conflict with Federal requirements for full and open competition.

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3.6.3 Within our **Agency Procurement Policy** it states that our Agency will:

3.6.3.1 Assistance to Small and Other Business, Required Efforts:

3.6.3.1.1 Including such firms, when qualified, on solicitation mailing lists; and,

3.6.3.1.2 Encouraging their participation through direct solicitation of proposals or proposals whenever they are potential sources; and,

3.6.3.1.3 Dividing total requirements, when economically feasible, into smaller purchases or quantities to permit maximum participation by such firms; and,

3.6.3.1.4 Establishing delivery schedules, where the requirement permits, which encourage participation by such firms; and,

3.6.3.1.5 Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce; and,

3.6.3.1.6 Requiring prime contractors, when subcontracting is anticipated, to take the positive steps listed above.

3.6.4 Requirements. Accordingly, please see Section 3.1.7 within Table No. 3 herein which details the information pertaining to this issue that the proposer must submit in response to this proposal showing compliance, to the greatest extent feasible, with these regulations.

3.7 Pre-proposal Conference. There is not a Pre-proposal Conference scheduled as a part of this RFP competitive solicitation process.

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

[Table No. 5]

(1) RFP Section	(2) Document No.	(3) Attachment	(4) Attachment Description
3.8.1	1.0		This RFP Document
3.8.2	2.0	A	Form of Proposal

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3.8.3	3.0	B	<p>HUD Forms</p> <ul style="list-style-type: none"> • Form HUD 5369-C Certifications and Representations of Proposers, Non-Construction Contract • Instruction to Offerors Non-Construction • Form HUD 2922 Certification Regarding Debarment and Suspension • Form HUD 50071 Certification of Payments to Influence Federal Transactions • Standard Form LLL Disclosure Form to Report Lobbying (if required per HUD 50071)
3.8.4	4.0	C	Profile of Firm Form
3.8.5	5.0	D	Section 3 Explanation
3.8.6	6.0	E	Agency Supplemental Instructions To Proposers & Contractors (SIPC)
3.8.7	7.0	F	Sample Contract Form (please note that this contract and the listed appendices are being given as a sample only—the Agency reserves the right to revise any clause herein and/or to include within the ensuing contract any additional clauses that the Agency feels it is in its best interests to do so)
3.8.7.1	7.1	F-1	Sample Contract Appendix No. 1: form HUD-5370-C (01/2014), <i>General Conditions for Non-Construction Contracts Section I (With or without Maintenance Work)</i>
3.8.7.2	7.2	F-2	Sample Contract Appendix No. 2: form HUD 50071 (01/14), <i>Certification of Payments to Influence Federal Transactions</i> (NOTE: This form will only be completed and included as a part of the ensuing contract if the Agency anticipates that total awards pursuant to the ensuing contract may or will exceed \$100,000.)
3.8.7.3	7.3	F-3	Sample Contract Appendix No. 3: Standard Form LLL (Rev. 01/14), <i>Disclosure of Lobbying Activities</i> (NOTE: This form will only be completed and included as a part of the ensuing contract if the Contractor designates an affirmative answer to Item No. (2) within the immediate identified form 50071.)
3.8	8.0		Fee Submission Form

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4.0 PROPOSAL EVALUATION.

4.1 Evaluation Factors. The following factors will be utilized by the Agency to evaluate each proposal submittal received; award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal:

[Table No. 6]

(1) Factor No.	(2) Max Point Value	(3) Factor Type	(4) Factor Description
1	20 points	Objective	The proposed costs submitted by the proposer.
2	10 points	Subjective (Technical)	The proposer's demonstrated understanding of the Agency's requirements.
3	40 points	Subjective (Technical)	The proposer's demonstrated relevant experience and qualifications in performing similar work and successful past performance (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
4	10 points	Subjective (Technical)	Previous Client Satisfaction
	90 points		Sub Total Points - Excluding Interview Points
		Subjective (Technical)	Contractors with highest scores in categories one through five may be asked to participate in the second stage, consisting of the fifth factor: Interview. Any and all interviews are at the sole discretion of the Authority.
5	10 points		Appear and Participate in an Interview with the Authority to discuss qualifications and proposal. Scores assigned for proposals, under any category, may be amended based on information obtained during the oral interviews.
	100		Total Possible Points
*NOTE: Points will be awarded for each Subjective Factor by each of the appointed evaluation committee members based on his/her opinion after a thorough review of the information submitted by each proposer within his/her proposal.			

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- 4.2 Evaluation Method.** Please note that the Agencies may choose to evaluate the proposals submitted together, or the Agencies may choose to evaluate the proposals submitted separately at each Agency. In any case, the result of the evaluation may be that the Agencies complete award to the same proposer or may be that the Agencies complete award to different proposers. The eventual award will occur based on the following detailed brief procedures.
- 4.2.1 Initial Evaluation for Responsiveness.** Each proposal received will first be evaluated for responsiveness (i.e., meets the minimum of the requirements). NOTE: Please reference Section 3.1 herein.
- 4.2.2 Evaluation Packet.** An evaluation packet will be prepared for each evaluator, typically including the following documents:
- 4.2.2.1** Instructions to Evaluators;
 - 4.2.2.2** Proposal Tabulation Form;
 - 4.2.2.3** Written Narrative Form for each proposer;
 - 4.2.2.4** Recap of each proposer’s responsiveness;
 - 4.2.2.5** Copy of all pertinent RFP documents.
- 4.2.3 Evaluation Committee.** The Agency anticipates that it will select a minimum of a three-person committee to evaluate each of the responsive “hard copy” proposals submitted in response to this RFP. PLEASE NOTE: No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of the identity of such person(s), he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFP. As detailed within Section 3.4 of this document, the designated CO is the only person at the Agency that the proposers shall contact pertaining to this RFP. Failure to abide by this requirement may (and most likely will) cause such proposer(s) to be eliminated from consideration for award.
- 4.2.4 Evaluation.** The CO will evaluate and award points pertaining to Evaluation Factor No. 1 (the “Objective” Factor). The appointed evaluation committee, independent of the CO or any other person at the Agency, shall evaluate the responsive proposals submitted and award points pertaining to Evaluation Factors No. 2 through No. 5 (the “Subjective” Factors). Upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the CO.
- 4.2.4.1 Points Awarded Range.** Pertaining to the Subjective Factors, note the following range of points awarded (points pertaining to this RFP are shaded—also see the Evaluation Factors detailed within the preceding Section 4.1 herein):

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[Table No. 7]

Classification*	Points Awarded Range				
	Rating	%	10	30	100**
Acceptable	Excellent	95%/+	10	29-30	95-100
Acceptable	Very Good	90%/+	9	27-28	90-94
Potentially Acceptable	Good	80%/+	8	24-26	80-89
Potentially Acceptable	Average	70%/+	7	21-23	70-79
Unacceptable	Poor	<70%	0-6	0-20	0-69

*Pursuant to Section 7.2.N.3 of HUD Procurement Handbook 7460.8 REV 2.
 **Total available points to be awarded, including cost points, minus preference points.

4.2.5 Potential “Best and Finals” Negotiations. The Agency reserves the right to, as detailed within Section 7.2.N through Section 7.2.R of HUD Procurement Handbook 7460.8 REV 2, conduct a “Best and Finals” Negotiation, which may include oral interviews, with all firms deemed to be in the competitive range. Any firm deemed not to be in the competitive range shall be notified of such in writing by the Agency in as timely a manner as possible, but in no case within no longer than 5 business days after the beginning of such negotiations with the firms deemed to be in the competitive range.

4.2.6 Determination of Top-ranked Proposer. The subjective points awarded by the evaluation committee shall be combined with the objective points awarded by the CO to determine the final rankings, which shall be forwarded by the CO to the CEO for approval. If the evaluation was performed to the satisfaction of the CEO, the final rankings may be forwarded to the Agency Board of Commissioners (BOC) at a scheduled meeting for approval. Contract negotiations may, at the Agency’s option, be conducted prior to or after the BOC approval.

4.2.6.1 Minimum Evaluation Results. To be considered to receive an award a proposer must receive a total calculated average of at least 70 points.

4.2.6.2 Ties. In the case of a tie in points awarded, the award shall be decided as detailed within Section 6.12.C of HUD Procurement Handbook 7460.8 REV 2, by “drawing lots or other random means of selection.”

4.2.7 Notice of Results of Evaluation. If an award is completed, all proposers will receive by e-mail a Notice of Results of Evaluation. Such notice shall inform all proposers of:

4.2.7.1 Which proposer received the award;

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- 4.2.7.2 Where each proposer placed in the process as a result of the evaluation of the proposals received;
 - 4.2.7.3 The cost or financial offers received from each proposer;
 - 4.2.7.4 Each proposer's right to a debriefing and to protest.
- 4.2.8 **Restrictions.** All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the Agency evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the Agency evaluation committee.

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5.0 CONTRACT AWARD

5.1 Contract Award Procedure. If a contract is awarded pursuant to this RFP, the following detailed procedure will be followed:

5.1.1 An Agreement to Abide. By completing, executing and submitting the Form of Proposal, Attachment A, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by the Agency, either in hard copy or on the eProcurement Marketplace, including the contract clauses already attached as Attachments G and G-1 through G-3. Accordingly, the Agency has no responsibility to conduct after the submittal deadline any negotiations pertaining to the contract clauses already published.

5.2 Contract Conditions. The following provisions are considered mandatory conditions of any contract award made by the Agency pursuant to this RFP:

5.2.1 Contract Form. The Agency will not execute a contract on the successful proposer’s form—contracts will only be executed on the Agency form (please see Sample Contract, Attachments F and F-1 through F-3), and by submitting a proposal the successful proposer agrees to do so (please note that the Agency reserves the right to amend this form as the Agency deems necessary). However, the Agency will during the RFP process (prior to the submittal deadline) consider any contract clauses that the proposer wishes to include therein and submits in writing a request for the Agency to do so; but the failure of the Agency to include such clauses does not give the successful proposer the right to refuse to execute the Agency’s contract form. It is the responsibility of each prospective proposer to notify the Agency, in writing, prior to submitting a proposal, of any contract clause that he/she is not willing to include in the final executed contract and abide by. The Agency will consider and respond to such written correspondence, and if the prospective proposer is not willing to abide by the Agency’s response (decision), then that prospective proposer shall be deemed ineligible to submit a proposal.

5.2.1.1 HUD Forms. Please note that the Agency has no legal right or ability to (and will not) at any time negotiate any clauses contained within ANY of the HUD forms included as a part of this RFP.

5.2.2 Assignment of Personnel. The Agency shall retain the right to demand and receive a change in personnel assigned to the work if the Agency believes that such change is in the best interest of the Agency and the completion of the contracted work.

5.2.3 Unauthorized Sub-Contracting Prohibited. The successful proposer shall not assign any right, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CO. Any purported

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assignment of interest or delegation of duty, without the prior written consent of the CO shall be void and may result in the cancellation of the contract with the Agency, or may result in the full or partial forfeiture of funds paid to the successful proposer as a result of the proposed contract; either as determined by the CO.

- 5.3 Contract Period.** The Agency anticipates that it will initially award a contract for the period of 1 year with the option, at the Agency's discretion, of up to 4 additional one-year option periods, for a total maximum contract period of 5 years prior to the Agency issuing another RFP (as per HUD guidelines).
- 5.4 Licensing and Insurance Requirements.** Prior to award (but not as a part of the proposal submission) the *successful proposer* will be required to provide:
- 5.4.1 Workers Compensation Insurance.** An original certificate evidencing the proposer's current industrial (worker's compensation) insurance carrier and coverage amount (NOTE: Workers Compensation Insurance will be required of any Contractor that has employees other than just the owner working on-site to provide the services);
 - 5.4.2 General Liability Insurance.** An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum deductible amount of \$50,000);
 - 5.4.3 Professional Liability Insurance.** An original certificate showing the proposer's professional liability and/or "errors and omissions" coverage (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000), with a commercially reasonable deductible (i.e., "commercially reasonable," meaning not greater than 1% of the "general aggregate minimum" of the policy, with a maximum deductible amount of \$50,000);
 - 5.4.4 Automobile Insurance.** An original certificate showing the proposer's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$100,000/\$300,000 and medical pay of \$5,000.

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- 5.4.5 **City/County/State Business License.** If applicable, a copy of the proposer’s business license allowing that entity to provide such services within the City of Lorain, the County of Lorain, and/or the State of Ohio.
- 5.4.6 **Certificates/Profile of Firm Form.** Pertaining to the aforementioned (within Sections 5.4.1 through 5.4.5) insurance certificates and licenses, each proposer is required to enter related information where provided for on the Profile of Firm Form (do not attach or submit copies of the insurance certificates or licenses within the proposal submittal—we will garner the necessary documents from the successful proposer prior to contract execution).
- 5.5 **Right to Negotiate Final Fees.** The Agency shall retain the right to negotiate the amount of fees that are paid to the successful proposer, meaning the fees proposed by the top-rated proposer during negotiations may, at the Agency’s options, be the basis for the beginning of negotiations. Such negotiations may only begin after the Agency has chosen a top-rated proposer, and shall generally occur as a part of the Competitive Range negotiation process detailed within Section 7.2.N of HUD Procurement Handbook 7460.8 REV 2.
- 5.6 **Contract Service Standards.** All work performed pursuant to this RFP must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.
- 5.7 **Prompt Return of Contract Documents.** Any and all documents required to complete the contract, including contract signature by the successful proposer, shall be provided to the Agency within 10 workdays of notification by the Agency.

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