

HOUSING AUTHORITY OF THE COUNTY OF LAKE, IL

**REQUEST FOR PROPOSAL
FOR
FINANCIAL CONSULTING SERVICE PROVIDER**

RFP # 17-FEE-OF

CLOSING DATE: December 14, 2017 10a.m.

No late proposals will be accepted.

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- Attachment 1, HUD Form 5369-B
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- Attachment B, HUD Form 5369-C
Representations, Certifications, and Other Statements of Offerors
- Attachment C, HUD Form 5370-C
Section 1, General Contract Conditions – Non-Construction
- Attachment D, HUD Form 50071
Certification of Payments to Influence Federal Transactions
- Attachment E, HUD Form 2530
Previous Participation Certification
- Attachment F, Non-Collusive Affidavit
- Attachment G, Disclosure of Ownership
- Attachment H, List of Core Employees
- Attachment I, Acknowledgement of Addenda if any
- Attachment J, MBE/WBE Subcontractors, Suppliers, Consultants- Letter of Intent
- Attachment K, MBE/WBE Prime Contracting Action Plan & Contracting Schedule
- Attachment L, Section 3 Summary Report
- Attachment M, Detail of Services Required
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PART I – GENERAL BACKGROUND INFORMATION

1.1 Introduction/Background Information

The Housing Authority of the County of Lake, IL (LCHA) is requesting qualifications from qualified and experienced firms and/or individuals capable and ready to enter into a **Fee Accounting Consulting Services** contract to ensure timely responsive services for authority wide review. Primary location for to review to be located at:

LCHA Main Office 33928 N US Hwy 45, Grayslake

Scope of Services:

The Lake County Housing Authority seeks a company to provide as needed **Fee Accounting Consulting Services**. LCHA's Accounting department has undergone significant changes creating the need for supplemental accounting assistance with HUD/Public Housing Authority-specific expertise. The selected firm would be hands on with the process, providing accounting support ranging from bank statement and general ledger reconciliation to preparation of monthly financials and submission of Financial Data Schedules. The selected firm would also provide training recommendations so as to build in-house knowledge related to satisfying the accounting and reporting requirements of the Department of Housing and Urban Development. Lake County Housing Authority is a mid-size public housing authority with 495 public housing units and 3076 HCV vouchers. Its fiscal year-end is September 30th.

LCHA intends to commence these services no later than December 22, 2017.

LCHA shall hold the option to renew services as needed for up to four (4) one year additional terms. LCHA will require the selected vendor to provide the services set forth below and furnish all equipment, personnel, and other materials necessary to provide such services.

It is important to note these are occupied buildings and all reasonable efforts must be utilized to maintain proper working conditions.

Contractor will immediately alert LCHA if property is damaged or vandalized in any way that is an immediate threat to public safety.

To all practical extent, LCHA wishes to maintain safe and accessible communities for LCHA, its residents, employees, and guests. This includes a safe means of entry to, exit from, and movement within the communities. The selected vendor will be contracted to a "hold harmless" clause and will provide recordkeeping including (but not limited to) location information, date and time, names and jobs of personnel doing the work and any incident reports.

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Below is a basic list of what is requested but not limited to under the proposed agreement:

External Reporting

- Preparation and submission of monthly VMS report.

Internal Reporting

- Preparation of monthly Financials Statements.
 - Posting of month-end and recurring journal entries.

General Accounting Tasks

- Monthly reconciliation of all bank statement and posting of requisite journal entries.
- Monthly reconciliation of all balance sheet accounts and posting of requisite journal entries.
- Maintenance of Fixed Asset ledgers and posting of requisite journal entries.

Other

- Provide training recommendations so as to build in-house knowledge related to satisfying the accounting and reporting requirements of the Department of Housing and Urban Development.
- Provide assistance/guidance as needed with Operating Budgets & Revisions, Operating Subsidy Calculations, and unaudited and audited REAC financial statement submission.
- Provide assistance/guidance as needed with any HUD form related to financial information required of the PHA.
- Provide assistance in answering questions from HUD auditors/officials or any other agency related to financial information required of the PHA.

The proposal should provide for:

- 1) *A bill rate for subsequent technical support, on the phone, work done at vendor site and a fully loaded rate for in house support.*

COST PROPOSAL:

The Respondent's proposals must include the following:

- Professional and technical qualification of the auditor and staff assigned to the engagement – (GAGAS, GAAS' General Standards)
- Relevant experience applicable to HUD accounting standards

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- Compliance with applicable requirements for peer review and professional continuing education.
- Proposed timeline for requested services, detail all aspects including but not limited to on-site time.
- A breakout of Fees and Costs on a as needed basis including but not limited to salaries and any travel expenses.

The total project will be contracted to a not to exceed value based on LCHA's approval of contractor proposal.

Respondents to this solicitation must have documented experience in Financial Consulting contracting with agencies such as the Housing Authority of the County of Lake, IL and working in and around tenant occupied complexes. The Housing Authority of the County of Lake, IL (LCHA) is a corporation of municipal government governed by a seven member Board of Commissioners. Our mission is to serve the Lake County community with housing opportunities and options. The LCHA has contractual relationships with the U.S. Department of Housing and Urban Development (HUD) from which it receives funds for program development and operation. The LCHA's principal sources of income are fees, grants, rental income, and investment income. The LCHA currently owns 495 units of Low Rent Public Housing, 20 subsidized units, and manages another 27 units for a local non-profit agency. The LCHA administers over 3076 vouchers through its Section 8 Housing Choice Voucher Program and acts as contract administrator for 304 units of Multifamily Section 8. The LCHA has a combined annual budget in excess of \$30,000,000. There are currently 55 employees.

The Housing Authority of the County of Lake, IL will not discriminate against otherwise qualified persons because of disability in the admission, access to, treatment, or employment in its programs and activities. This policy is applicable to all programs and activities of the Housing Authority of the County of Lake, IL.

1.2 Method of Solicitation

LCHA is soliciting competitive proposals from qualified firms with a documented track record of providing the required services, preferably for large public housing authorities, through a formal Request for Proposals (RFP) process. Proposals should demonstrate detailed plans on how the Respondent intends to provide the required services in a manner that will result in the successful and timely completion of the service(s). In addition, the proposal shall demonstrate the Respondent's capacity and readiness to perform the Scope of Services immediately upon execution of a contract with LCHA. Finally, the proposal shall include evidence of the Respondent's previous experience and qualifications relative to the provision of such services. Once selected, the successful Respondent will enter into a firm fixed-priced contract agreement with LCHA to perform the required scope of services. Such contract agreement will be contingent upon approval from LCHA's Board of Commissioners.

1.3 OBTAIN COPIES OF THIS SOLICITATION

Single copies of the RFP package may be obtained, at no cost, by visiting the LCHA website at www.lakecountyha.org to download all RFP documents in Portable Document Format (PDF), or
(Call and make arrangements):

Housing Authority of the County of Lake, IL
Contracts Department
33928 N. Route 45
Grayslake, IL 60030
Phone: 847-223-1170 Ext. 2240
Email: Kjackson@lakecountyha.org

Persons wishing to receive copies via overnight delivery are responsible for making all arrangements and paying all/any related costs.

PART II - SUPPLEMENTAL INSTRUCTIONS TO OFFERORS

Proposals should demonstrate detailed plans on how the Respondent intends to provide the required services in a timely and professional manner. In addition, the proposal shall demonstrate the Respondent's capacity and readiness to perform the Scope of Services immediately upon execution of a contract with LCHA. Finally, the proposal shall include evidence of the Respondent's previous experience and qualifications relative to the provision of such services.

2.1 Submission of Proposals

Responses to this solicitation will be received by the LCHA until **10:00 AM** local time on **December 14, 2017**. **No late proposals will be accepted**. Deliver response **VIA Email** with the subject listed as: **RFP #17-FEE-OF** to the following address:

Submission including all required documents is to be sent electronically to the following address:

Procurement@LakeCountyHA.org

2.2 Addendum - RFP Interpretations/Questions and Update Procedures

All request for interpretation /questions must be **submitted by December 8, 2017 12:00 pm to:**

Email: KJackson@lakecountyha.org

During the period between issuance of this RFP and the proposal due date, no oral interpretation of the RFP's requirements will be given to any prospective offerors.

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Requests for interpretation must be made, in writing, at least seven (7) days before the submission due date and time.

LCHA may wish to amend, add to, or delete from, the contents of this RFP. In such situations, LCHA will issue an addendum to the RFP setting forth the nature of the modification(s). LCHA will post addendums on the LCHA's website at www.lakecountyha.org.

It shall be the responsibility of each Respondent to insure they have any/all additional addenda relative to this RFP.

2.3 Proposal Format

Consideration should be given to the form and format of the submittal to facilitate LCHA's internal review of the submittal. Proposals shall be organized into sections for ease of review. Provide a comprehensive Table of Contents at the front of the proposal. Organize the proposal in response to the Submission Requirements, taking care to address all issues identified in the Scope of Services. The front cover of the proposal shall bear the name and number of the RFP, the date, and the Respondent's name, address, phone, and fax number.

2.4 Submittal Forms

Provide, as a part of the proposal, all required certifications on forms included on the Index of Documents page, and included all Attachments of this RFP as attached. Each form that requires signatures or initials must bear an original signature or initial.

2.5 Acceptance of Proposals

Proposals must be signed and received in completed form at the Housing Authority of the County of Lake, IL, 33928 N. Route 45, Grayslake, Illinois 60030-5335, no later than the proposal closing date and time. Proposals submitted after the designated closing date and time will not be accepted for any reason, and will be returned unopened to the originator.

LCHA reserves the right to accept or reject any or all proposals, to take exception to these RFP specifications or to waive any formalities. Respondents may be excluded from further consideration for failure to fully comply with the specifications of this RFP. LCHA also reserves the right to reject the proposal of any Respondent who has previously failed to perform properly or to complete on time, a contract of similar nature; who is not in a position to perform the contract; or who habitually and without just cause neglected the payment of bills or otherwise disregarded its obligations to subcontractors, providers of materials, or employees.

2.6 Time for Reviewing Proposals

Proposals received prior to the closing date and time will be securely kept. No proposal received after the closing date and time will be considered unless there were less than

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three proposals then the LCHA may select to complete an addendum to extend the timeframe. All proposals properly received will be tabulated, analyzed, and a recommendation made for Award of Contract to the LCHA Board of Commissioners if required.

2.7 Withdrawal of Proposals

Proposals may be withdrawn on Email request dispatched by the Respondent in time for delivery in the normal course of business prior to the time fixed for receipt; provided that written confirmation of any telegraphic withdrawal over the signature of the Respondent is placed in the mail and postmarked prior to the time set for proposal opening. Negligence on the part of the Respondent in preparing its Proposal confers no right of withdrawal or modification of its proposal after the due date and time.

2.8 Award of Contracts

Contracts shall be awarded to the Respondent(s) submitting proposals according to the evaluation criteria contained herein, provided the proposal is in the best interest of LCHA. The Respondents to whom awards are made will be notified at the earliest practical date. An award may be subject to the Department of Housing and Urban Development's (HUD's) or Civil Service approval. No awards may be made to companies or individuals that are on HUD's list of contractors ineligible to receive awards from the LCHA or the United States, as furnished from time to time by HUD.

2.9 Certification of Legal Entity

Prior to execution of the contract agreement, the Respondent shall certify that joint ventures, partnerships, team agreements, new corporations, or other entities that either exist or will be formally structured are, or will be, legal and binding under State of Illinois law.

2.10 Costs Borne by Respondent

All costs related to the preparation of this RFP and any related activities are the responsibility of the Respondent. LCHA assumes no liability for any costs incurred by the Respondent throughout the entire selection process.

2.11 Best Available Data

All information contained in this RFP is the best data available to LCHA at the time the RFP was prepared. The information given in the RFP is not intended as representations having binding legal effect. This information is furnished for the convenience of Respondents and LCHA assumes no liability for any errors or omissions.

2.12 Contacts with LCHA Staff, Board Members, and Residents

Respondents may not make any contact with LCHA staff, Board Members, or residents. All communications with LCHA shall be in writing as provided in HUD Form 5369-B, Instructions to Offerors Non-Construction, Paragraph 4.

2.13 Respondent Responsibilities

Each Respondent is presumed by LCHA to have thoroughly studied this RFP and become familiar with the package contents, locations, nature of request, etc. covered by the RFP package. Any failure to understand completely any aspect of this RFP is the responsibility of the Respondent.

2.14 504, ADA, Vietnam Veterans Readjustment Assistance Act, Compliance

Bidder agrees to comply with the federal statutes relating to non-discrimination. These include, but are not limited to, Section 504 of the Rehabilitation Act of 1973 as amended (29 USC section 794) which prohibits discrimination on the basis of handicap and the Americans with Disabilities Act of 1990.

2.15 Section 3 - Employment/Training and Business

All contractors/vendors are required to provide Section 3. Refer to Additional Rights and Clauses for this requirement;

PART III – SUBMISSION REQUIREMENTS

Listed below are the sections that must be included in the proposal. Each section must be clearly labeled using the bold-faced titles listed below. The required submission must be bound and each section tabbed.

3.1 Staffing and Qualifications

- a. Provide information regarding staff experience and qualifications that demonstrates the Respondent's capacity to perform the required services. Include an organizational chart that illustrates Respondent's overall staffing approach for completing the required work. Include in the chart all key personnel, specialists, and consultants who will be assigned work under a contract potentially resulting from this RFP.
- b. Provide resumes of all key personnel, specialists, and consultants who will perform the work required by a contract potentially resulting from this RFP. Identify their specific role in the provision of services required. Resumes should include the particular relevant experience of the individual as it relates to their proposed role in the project, in addition to the education, career, and achievement data typically included in a resume. Include evidence of required

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licenses and certifications, as applicable, held by the Respondent, its principals, and/or key staff.

- c. Identify all individuals who will be devoted to the project on a full time basis or part time basis (up to 50% of time allocated to project). Include those who will be full time only for specific components of the project, as well as those filling a continuing position throughout the project. Provide detailed resumes for each, highlighting the particular experience that qualifies them for the position they will fill.
- d. All staff must be pre approved by LCHA prior to commencing any work. LCHA reserves the right to assess a \$50 fee per service employee for a background check fee.

3.2 Relevant Experience and Past Performance

- a. Identify similar or related work performed for public housing authorities that has been completed to date, or is currently active. Include projects completed or currently underway by the responding entity and/or each major participant in the proposal.
- b. For each project identified provide:
 - i. Project name and address.
 - ii. Contact person, title, phone number, email, fax and address
 - iii. Detailed description of scope of work.
 - iv. The client for whom the Respondent's services were performed, its size and yearly funded operations.
 - v. The size of the project.
 - vi. The services performed by the Respondent on the project.
 - vii. The dollar value of the contract for the services
 - viii. The duration of the project including start and completion dates, or projected completion date if still active.
 - ix. Reference contacts for the project with name address and phone number.
- c. Identify past experience in performing work for large public housing authorities possessed by the Respondent and/or its participants.
- d. Demonstrate ability to produce reports that are well regarded in the industry in terms of content, timeliness, and responsiveness.
- e. Demonstrate, through written explanation, the Respondent's familiarity with Federal, State, and local laws, regulations and codes that the Respondent believes may be pertinent or applicable to this project.
- f. If the Respondent is a joint venture, or another entity formed solely for responding to this RFP, provide evidence of prior successful collaborations.

3.3 References

- a. Provide a complete list of clients, previous and current. This list must include the name and title of the contact person, with an address, phone number, e-mail address, and fax number.
- b. The clients listed should be those served by members of the proposed employee and/or local office who will be serving LCHA.

3.4 Respondent's Approach and Response to Scope of Services

- a. Provide a detailed narrative that demonstrates the approach intended for use by the Respondent. A proposed work plan and time schedule addressing the scope of work.] Please indicate the total estimated hours required by classification by the partner, manager, senior and staff.
- b. The Respondent should outline its anticipated approach for each element of work identified in the Scope of Services.
- c. The approach outlined should be consistent with the objectives and requirements set forth in the RFP, and should address how services will be immediately provided upon execution of a contract.
- e. Include proposed processes for ensuring effective coordination, as well as procedures for reporting and disseminating information.
- f. Outline the level of support your firm will require of the LCHA staff.

3.5 Cost Proposal

- a. Provide a firm fixed price for project management in relationship to all work described in the Scope of Services contained herein.
- b. Include a cost breakdown that details the elements of the proposed costs (i.e. labor rates, consultants, etc.).

3.6 Required Certifications/Forms

The following documents, which may or may not be contained in as Attachments herein, or requested as detailed in this RFP, must be included in the proposal in the order that follows below, and must be properly signed, initialed, notarized, and/or have a corporate seal affixed where indicated. Contractor forms may be substituted where HUD form is not available:

- Scope of Work - Part V

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- Attachment 1, HUD Form 5369-B, Instructions to Offerors – Non-Construction
- Attachment A, Additional Rights and Clauses
- Attachment B, HUD Form 5369-C, Representations, Certifications, and Other Statements of Offerors
- Attachment C, HUD Form 5370-C, Section 1, General Contract Conditions – Non-Construction
- Attachment D, HUD Form 50071, Certification of Payments to Influence Federal Transactions
- Attachment E, HUD Form 2530, Previous Participation Certification
- Attachment F, Non-Collusive Affidavit
- Attachment G, Disclosure of Ownership
- Attachment H, List of Core Employees
- Attachment I, Acknowledgement of Addenda
- Attachment J, MBE/WBE Subcontractors, Suppliers, Consultants- Letter of Intent
- Attachment K, MBE, WBE Prime Contracting Action Plan & Contracting Schedule
- Attachment L, Section 3 Summary Report
- Exhibit I, Notification of Interest
- Business License
- Article of Incorporation
- Any applicable - Certifications

NOTE: ALL DOCUMENTS LISTED MUST BE SUBMITTED WITH THE PROPOSAL RESPONSE TO BE CONSIDERED RESPONSIVE.

PART IV – PROCUREMENT PROCESS

4.1 Proposal Evaluation/Contract Award

- a. Proposals received in response to this solicitation may be evaluated using a 2-stage evaluation process.
- b. Stage I of the evaluation process will be used to determine the firms that will comprise the short list, from which final selection for contract award will ultimately be made.
 - i. During Stage I of the evaluation process, technical proposals will be evaluated and scored by an Evaluation Committee.
 - ii. Each member of the selection committee will score each proposal. Cost proposals will be evaluated and scored separately by the Contracting Officer and/or his designee(s).

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- iii. Scoring will be based on predetermined Evaluation Criteria. The available points associated with each area of consideration are shown below in Item 4.2.
 - iv. The results of the evaluation of both technical and cost proposals will be used to determine those proposals to be considered in the competitive range and included on the short list.
 - v. A short list (Stage II –Ref. C) of three (3) firms with the highest ranked proposals maybe invited to a Step II interview process if LCHA requires further evaluation of the Respondents. Respondents included on the short list must have technical and cost proposals that are considered acceptable and satisfactorily complete a due diligence review (verification of Respondent responsibility).
 - vi. Technical proposals will be considered acceptable if they are ranked in the top three (3) and have a minimum score of seventy (70) points.
 - vii. Cost proposals will be considered acceptable if the proposed cost is not clearly excessive compared to the proposed costs of other Respondents with acceptable technical proposals.
 - viii. Respondents with acceptable technical and cost proposals may be requested to supply additional information to assist in completing the due diligence review. Failure to satisfactorily complete the due diligence review within the timeframe established by LCHA will result in exclusion from the short list.
- c. Scoring will be based upon how well the proposal meets the criteria established in this RFP.

4.2 Stage II Evaluations

- a. Stage II of the evaluation process will be reserved for the short listed firms only, and will be the basis for ultimate contract award.
 - i. Stage II of the evaluation process will entail negotiations/interviews with the Respondents on the short list.
 - ii. Respondents not included on the short list will not proceed to Stage II of the evaluation process.
 - iii. The purpose of the negotiations/interviews is to promote the understanding of LCHA's requirements with respect to this RFP, promote the understanding of the Respondents' proposals, and to arrive at agreeable contract terms.
 - iv. Upon completion of the negotiations/interviews, LCHA will establish a common date and time for submission of best and final offers.

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- v. Best and final offers will be evaluated in accordance with the same procedures outlined above for Stage I evaluation. The initial proposal submitted by Respondents who do not submit a best and final offer shall be construed as their best and final offer.
- b. LCHA reserves the right to make contract award without negotiations and a Stage II Evaluation, and to make no award, or decline to enter into negotiations shall it believe that no Respondent to this RFP will be capable of delivering the necessary level of services within an acceptable price range and/or time period.
- c. Shall LCHA exercise its right to make contract award without negotiations, contract award will be based on the ranking of initial proposals received.
- d. The Evaluation Committee will evaluate the merits of proposals received in accordance with the evaluation factors stated in the RFP and formulate a recommendation. However, while a numerical rating system may be used to assist the Evaluation Committee in selecting the competitive range (if necessary) and making an award recommendation decision, the award decision is ultimately a business decision that will reflect an integrated assessment of the relative merits of the proposal using the factors and their relative weights disclosed in the RFP.

Note: Contract award may be subject to approval by LCHA's Board of Commissioners.

4.3 Evaluation Criteria

- a. Organizational Capacity: 25 Points
 - i. Respondent's organizational capacity will be evaluated through an assessment of the Respondent's staff, specialists', and consultants' experience and qualifications. In addition, the Respondent's ability to perform the work in a timely manner will be evaluated through a review of previous performance on similar projects, as well as current and projected capacity and workload.
 - ii. Maximum consideration will be given to those Respondents having staff with the greatest amount of experience in performing work as required herein, and who can demonstrate sufficient capacity to perform the work timely given current and projected workload.
- b. Relevant Experience and Past Performance: 20 Points
 - i. Relevant experience and past performance will be evaluated through an assessment of previous, similarly related projects completed to date.

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- ii. Maximum consideration will be given to those Respondents, who demonstrate through their submittal, a documented track record of successfully completing projects of the same type required by this RFP.
 - iii. Maximum consideration will also be given to those Respondents who exhibit a successful track record of performing similar services for public housing authorities.
- c. Respondent's Approach and Response to Scope of Services: 20 Points
- i. The Respondent's approach and response to the Scope of Services will be evaluated through an assessment of the proposed approach for each element of work identified in the Scope of Services.
 - ii. Maximum consideration will be given to those Respondents, who demonstrate through their submittal, a clear and prudent plan for performing the required work within the established timeframe.
- d. Cost Proposal: 30 Points
- i. Cost proposals will be evaluated through careful analysis of the proposed cost of providing the requested services.
- e. Additional Points: 5 points

Maximum consideration will be given to those Respondents, who demonstrate through their submittals, that LCHA's stated participation goals for working with a MBE, WBE and RBE – Resident Owned Business, Section 3.

Summary of Additional Points: Participation: 5 points

4.4 Summary of Evaluation Criteria for Step I and Step II

STEP I Evaluation Criteria

Technical:

Organizational Capacity 25 Points

Relevant Experience and Past Performance 20 Points

Respondent's Approach/Response to Scope of Services 20 Points

Total 75 Points

Cost:

Cost Proposal 30 Points

Total 20 Points

Additional Points:

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A firm can qualify for the categories listed above:

Participation Plan 5 Points

Total 5 Points

Step I - Total Possible Points 100 Points

PART V – SCOPE OF SERVICES

If the selected Respondent is successfully awarded a contract pursuant to this RFP, the Respondent shall then become LCHA’s Consultant, and said Consultant shall furnish sufficient organization, personnel, and management staff with the necessary skill and judgment to perform work as detailed below:

5.1 Consultant to provide all labor, materials, equipment, supervision and transportation necessary to provide the services outlined in this RFP. All work to be scheduled as detailed below or as scheduled with LCHA representative and performed in a competent and timely manner.

Part V – Scope of Services must be included with the RFP response.

Contractor (Initial): _____

More information on the above sites may be found on the LCHA Web site www.lakecountyha.org.

The Contractor will submit for approval all submittals, RFP’s, change orders that occur during the project.

Name of firm
Complete address
Contact person
Telephone number
E-mail address

5.5 CONTRACT TERMS

The contract is for a 1 year period with an option of four (4) 1-year extensions. The service provided may be optioned through the fiscal year **ending 2022**.

Part V – Scope of Services must be included with the RFP response.

Contractor (Initial): _____

PROPOSAL SUBMITTAL:

ALL PROPOSALS MUST BE RECEIVED BY

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December 14, 2017 10AM

Proposal must include all copies of LCHA bid documents as attached and executed by contractor along with certificate of insurance

Proposals must be submitted by e-mail at the following address:

KJackson@lakecountyha.org

Responses received later than the date and time specified will be rejected or deemed nonconforming. LCHA assumes no responsibility or liability for late delivery or receipt of responses. Notification of selection will be posted on the LCHA website when the selection process is final.