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IN REPLY PLEASE REFER TO:
20:CPO/060

March 6, 2020

TO: Interested Offerors
FROM: Rick T. Sogawa 
Procurement Officer
SUBJECT: Request for Proposals No. SPB-2020-15, Addendum No. 2
Professional Training, Testing, and Technical Assistance Services for
the Hawaii Public Housing Authority's Voucher Programs

This Addendum No. 2 is to: 1) provide the Pre-Proposal Conference meeting minutes conducted on March 3, 2020; 2) amend the proposal submittal due date/time; 3) provide responses to written questions received up until March 4, 2020; and 4) amend the RFP as follows:

Part I Pre-Proposal Conference Meeting Minutes:

See attached Minutes.

Part II – Amend Proposal Submittal Due Date/Time:

All corresponding dates/times provided in the RFP shall be amended to follow the revised timeline as indicated below.

<u>"Activity</u>	<u>Scheduled Dates</u>
Public notice announcing RFP	February 25, 2020
Distribution of proposal specs/proposal form	February 25, 2020
Pre-Proposal Conference	March 3, 2020
Deadline to submit written inquires	March 4, 2020
State response to written inquires	March 6, 2020
Proposal submittal deadlines	March 31, 2020;4:00 p.m. HST
Proposal review	April 2020
Notice of award	April 2020
Contract execution	April 2020
Start of services	April 2020 or upon issuance of the Notice to Proceed"

Part III – Responses to Written Questions:

Question 1. Travel Costs. Will there be any additional training (outside of the two weeks) or technical assistance that will require the Offeror to be onsite and as such, budget for additional reimbursable travel costs?

Response: There shall not be any additional training or technical assistance outside of the RFP specifications. However, the successful offeror may propose a different length of time with an explanation of how their proposed timing would be beneficial and whether additional on-site presence will be necessary.

Question 2. RFP Attachments. Section 5 of the RFP lists 13 attachments and indicates whether the attachment is “For Offeror’s information”, “For Bidders information”, or in the case of Attachment 10 (Form HUD 5369-C) is due on March 18, 2020. We seek clarification on the following attachments.

- a. Attachment 1 (Contractor’s Acknowledgement). Is this document also referred to as the “Corporate Resolution”? Does this document need to be signed **and notarized** and submitted with the proposal?
- b. Attachment 1 (Standards of Conduct Declaration). Does this document need to be completed, signed, and submitted with the proposal?
- c. Attachment 8 (General Conditions, Form HUD 5370-C). Does the attachment need to be attached to the proposal.
- d. Attachment 9 (Instructions to Offerors, Form HUD 5369-B). Same question as Attachment 8.
- e. Attachment 10 (Certifications and Representations, Form HUD 5369-C). Does this attachment need to be completed, signed, and submitted with the proposal?

Response:

- a. Attachment 1 (Contractor’s Acknowledgement) is part of the Sample Contract and does not need to be signed and notarized as it is for the Offeror’s information only. The Contractor’s Acknowledgement is not referred to as the “Corporate Resolution.”
- b. Attachment 1 (Standards of Conduct Declaration) is part of the Sample Contract and does not need to be completed and signed as it is for the Offeror’s information only.

- c. Attachment 8 (General Conditions, Form HUD 5370-C) is for the Offeror's information only.
- d. Attachment 9 (Instructions to Offerors, Form HUD 5369-B) is for the Offeror's information only.
- e. Attachment 10 (Certification and Representations of Offerors, Form HUD 5369-C) needs to be completed, signed and submitted with the proposal.

Question 3. Will the agency be selecting one vendor for all aspects of the scope of the project, or is the agency open to multiple vendors for the various aspects of the scope, i.e., file reviews, technical assistance training?

Response: The HPHA will be selecting one (1) Successful Offeror for the project. However, the Successful Offeror may subcontract for various aspects of the scope with prior approval from the HPHA.

Question 4. Is the agency open to using GSA rates for lodging and per diem cost?

Response: Please reference subparagraph No. v. on Pg. 24.

“v. Actual costs above the allowable reimbursable travel rates shall be the responsibility of the Successful Offeror. The Successful Offeror shall obtain prior written approval from the HPHA for reimbursable travel cost deviations from the requirements and specified rates.”

Question 5. Would the agency be open to any combination of on-site training enhanced with robust remote e-learning methods that enhance the training process?

Response: The Offeror may propose remote e-learning methods additionally to the required on-site training.

Question 6. Which aspects of the scope is the agency open to being completed remotely from the vendor (testing staff knowledge, PIC error resolution, training, technical assistance, etc.)?

Response: Please reference paragraph No. 12 on Pg. 22.

“12. **The HPHA is requesting 9 months of technical assistance where the successful offeror would be available via teleconference, skype and/or email depending on what is determined to be the most effective method of**

communication. Offerors proposals should anticipate up to 30 hours of technical assistance per month or a total of 270 hours for the 9 month period. Upon the resolution of HPHA's questions/issues, the successful offeror will document and submit the question and response to the HPHA via email."

Question 7. How often is the vendor expected to travel? Is this negotiable with the the selected vendor?

Response: The Successful Offeror shall be required to be on-site for the two-week training/monitoring period but may propose a different length of time.

Question 8. In reference to Scope of Services A.(6-8) Is the agency looking for an official comprehensive assessment at the start of the project to identify needs?

Response: The Offeror will need to determine the need for an official comprehensive assessment and may propose how they will provide the services.

Question 9. Could you send a copy of the current organizational chart for the HCV department, including any current vacancies?

Response: A current organizational chart will be available to the Successful Offeror.

Question 10. Can vendors propose on a portion of the scope of work?

Response: No, Offerors must propose on all portions of the scope work.

Question 11. Section V- Payment; Subsection 4 states that separate invoices must must be submitted for the respective workstreams. However, subsection 8 states (1) original monthly invoice. Please confirm (1) original monthly invoice will be required, totaling to three (3) invoices per month.

Response: Yes, one (1) original invoice for each workstream, totaling to three (3) invoices per month.

Question 12. What is HPHA's current full SEMAP score?

Response: 83.

Question 13. Does HPHA administer PBV or RAD PBV units?

Response: Yes, HPHA administers PBVs and intends to administer RAD PBVs in the future.

Question 14. Please confirm the estimated timeframe for technical assistance services.

Response: Please reference paragraph No. 12 on Pg. 22.

“12. The HPHA is requesting 9 months of technical assistance where the successful offeror would be available via teleconference, skype and/or email depending on what is determined to be the most effective method of communication. **Offerors proposals should anticipate up to 30 hours of technical assistance per month or a total of 270 hours for the 9 month period.** Upon the resolution of HPHA’s questions/issues, the successful offeror will document and submit the question and response to the HPHA via email.”

Question 15. Please confirm the estimated timeframe within which trainings must be provided.

Response: Please reference paragraph No.11 on Pg. 22.

“11. **All rent calculation and eligibility training and monitoring should occur over a two-week period on-site at the HPHA’s offices.** The successful offeror may, however, propose a different length of time with an explanation of how their proposed timing would work and why it is more beneficial.

Question 16. Can trainings be provided remotely via webinar, or only onsite?

Response: Trainings must be conducted onsite only. Offerors may propose technical assistance through various appropriate means.

Part IV – Amendments to the RFP:

1. Paragraph G. added as a new paragraph under Subsection VII. Submission of Sealed Proposals on Page 5, is hereby amended to read as follows:

“G. **Wages and Labor Law Compliance.** Prior to entering into a Contract in excess of \$25,000, an Offeror shall certify that it complies with section 103-55, HRS, wages, hours, and working conditions of employees of contractors performing services. Section 103-55, HRS, provides that the services to be performed shall be performed by employees paid at wages not less than wages paid to public officers and employees for

similar work. Offerors are further advised that in the event of an increase in wages for public employees performing similar work during the period of the Contract, the Successful Offeror shall be obligated to provide such increased wages.

Offerors shall complete and submit the attached Wage Certification certifying that the services required will be performed pursuant to section 103-55, HRS. See Attachment 15.

The Successful Offeror shall be further obligated to notify his employees performing work under this Contract regarding the provisions of section 103-55, HRS, and the current wage rates for public employees performing similar work. The Successful Offeror may meet this obligation by posting a written notice to this effect in the Successful Offeror's place of business in an area accessible to all employees.

Offerors are strongly encouraged to account for salary increases as posted by the State Department of Human Resources Development (DHRD). **The HPHA will consider requests for increases as a result of wage increases to public officers and employees during the contract period or any option period that are not published.** At the release of this solicitation, the wages effective July 1, 2019 for State employees performing similar work have been published by the DHRD and are available at <http://dhrd.hawaii.gov/state-hr-professionals/class-and-comp/salary-schedules/>.

If wages increase after the execution of the Contract, the Successful Offeror may request an increase in contract price in order to correspondingly increase the wages of the Offeror's employees performing the work, including any increase in costs for benefits required by law that are automatically increased as a result of increased wages, such as federal old age benefits, workers' compensation, temporary disability insurance, unemployment insurance, and prepaid health insurance.

The Successful Offeror shall not be compensated for any reimbursement of retroactive pay negotiated by the State. The Successful Offeror's request for the increase must meet the following criteria:"

2. Paragraph 4 under Subsection II. General Requirements on Page 13 under Section 2 of the RFP is hereby amended to read as follows:

- "4. The Successful Offeror shall have a permanent office in the State of Hawaii ~~or~~ where it conducts business and where it will be accessible in person or via telephone calls during normal Hawaii State government business hours from 7:45 a.m. to 4:30 p.m., HST, to address concerns or requests that

require immediate attention. See Attachment 7 11. An answering service is not acceptable. A permanent office location and phone number shall be stated in the interested offeror's proposal."

3. Subparagraph A.1. on Page 21 under Scope of Services, Section 2 of the RFP is hereby amended to read as follows:

- "1. Conduct training, testing and technical assistance **for up to seven (7) staff members** in the administration, management and operation of the Section 8 Housing Choice Voucher Programs Section 8 Project Based Voucher Program, Veterans Affairs Supportive Housing Voucher Program, Home Ownership, Mainstream Vouchers, and Family Unification Program."

4. Subparagraph A.9. on Page 22 under Scope of Services, Section 2 of the RFP is hereby amended to read as follows:

- "9. Conduct file audits of a minimum of 500 case files that are prepared after the conclusion of initial training and shall, at the request of the HPHA, review files on a case-by-case basis up to an additional 500 files **which may include any applicable interim recertification documents leading up to the most recent annual recertification.** The file audit shall include a list of errors and corrections necessary to bring the file into compliance with program regulations. Tenant case files will be made available electronically for access through a secured website **or other secure means of information transfer. The successful offeror may propose a different length of time with an explanation of how their proposed timing would be beneficial and whether additional on-site presence will be necessary.**

5. Subparagraph A.11 on Page 22 under Scope of Services, Section 2 of the RFP is hereby amended to read as follows:

- "11. All rent calculation and eligibility training and monitoring should occur over a two-week period on-site at the HPHA's offices. **Training must occur during the first week of the two-week on-site period followed by the initial file review, monitoring, and testing during the second week.** The successful offeror may, however, propose a different length of time with an explanation of how their proposed timing would work and why it is more beneficial.

6. Attachment 13 - Sample Price Proposal, Training and Testing Fee is amended as follows:

A. Professional Training and Testing

1. Training and Testing Fee:

Contract Term	Unit-Total Price for On-Site Training and Testing
9-Month Period	

See attached.

7. Section 5 – Attachments, Pg. 40 is amended as follows:

**Section 5
 Attachments**

- | | |
|---|----------------------------------|
| 1. Sample Contract Based on Competitive Sealed Proposals for Goods and Services (6/22/2009) | For Offeror's information |
| 2. Sample Contract – Attachment S1, Scope of Services | For Offeror's information |
| 3. Sample Contract – Attachment S2, Compensation and Payment Schedule | For Offeror's information |
| 4. Sample Contract – Attachment S3, Time of Performance | For Offeror's information |
| 5. Sample Contract – Attachment S4, Certificate of Exemption from Civil Service | For Offeror's information |
| 6. Sample Contract – Attachment S5, Special Conditions | For Offeror's information |
| 7. State General Conditions, AG-008 103D General Conditions | For Offeror's information |
| 8. General Conditions, Federal Form HUD 5370-C | For Bidder's information |
| 9. Instructions to Offerors, Form HUD 5369-B | For Bidder's information |
| 10. Certification and Representations of Offerors, Form HUD 5369-C | Due March 18, 2020 |
| 11. 2020 Hawaii State Government Observed Holiday | For Offeror's information |
| 12. Sample Transmittal Letter | For Offeror's information |
| 13. Sample Price Proposal Format | For Offeror's information |
| 14. Proposal Submittal Checklist | For Offeror's information |

8. All other terms and conditions of the RFP, as previously amended, shall remain in full force and effect.



Pre-Proposal Conference Minutes
RFP SPB-2020-15
Professional Training, Testing, and Technical Assistance Services

March 3, 2020
9:00 am

Attendance:

Rick Sogawa – HPHA
Tiana Kobashigawa – HPHA
Katie Sharp – CMS
Michael Tonovitz - CVR Associates
Deborah Irwin - Nan McKay
Kaynisha Dawson - Nan Mckay
Moon Tran – Phineas LLC
Chris Kubacki – Phineas LLC

I. Welcome

- a. Introduction of HPHA Staff
 - i. Rick Sogawa – Procurement Officer, oversees the procurement process and ensure that we adhere to procurement rules and policies.
 - ii. Tiana Kobashigawa – Contract Specialist/RFP Coordinator, conducts the procurement and is the main point of contact for this procurement; contact info provided on page 2 of RFP.
- b. This Conference is to highlight the RFP requirements. Offerors are responsible for the full content of the RFP. Submission of a proposal shall be regarded as the offeror’s assurance that he/she is willing and able to comply with all aspects/requirements of the RFP.
- c. Purpose or Need

Furnish Professional training, testing and technical assistance to include:

- 1. Training and testing services for the HPHA’s, Section 8 Subsidy Programs Branch and the federal awards under the Section 8 Choice Vouchers, Section 9 Project Based Voucher Program, Veterans Affairs Supportive Housing Voucher Program, Home Ownership, Mainstream Vouchers, and Family Unification Program.
- 2. Quality control case file audits.
- 3. As-needed technical assistance.

Questions may be asked during this conference and verbal responses may be provided, however, we may ask you to submit questions in writing and we will provide a written response via issuance of an addendum so that the same information is shared with other interested offerors so to be fair and transparent.

Attendance at this conference is not required in order to submit a proposal.

II. Section 1 – Administrative Overview (Pg. 1)

a. Procurement Timeline (Pg. 3)

3/4/2020 - Written Questions Due to the HPHA

- Must be in writing via email or fax.
- okay to submit questions after this date, HPHA may provide clarifications to substantive questions received after this deadline.

3/6/2020 - Written Responses to be issued by the HPHA via an addendum to the RFP and will be sent to all registered interested offerors.

3/18/2020 @ 4:00 p.m. – Proposal submittal deadline; proposals shall be sealed, identified with the RFP No., offeror’s legal name, business address, phone number and address it to the RFP Coordinator

- Must follow format as prescribed in Section 3 of RFP.
- Electronic submission and fax transmissions shall not be accepted.

March 2020 – Proposal Review

March 2020 – Notice of Award

March 2020 – Contract Execution

April 2020 or upon issuance of the Notice to Proceed – Start of Services

The HPHA reserves the right to amend or revise the timetable without prior written notice.

b. Wage and Labor Law Compliance (Pg. 5)

- Prior to entering into a Contract in excess of \$25k, an offeror shall certify that it complies with section 103-55, HRS, wages, hours, and working conditions of employees performing services under the resulting contract. See Attachment 15 – Wage Certificate. Not included in the posted RFP, will be addressed in addendum.
- The Successful Offeror shall pay wages not less than wages paid to public officers and employees for similar work. Public wages are published on the Department of Human Resources Development (DHRD) website, link provided on page 5.
- Offerors are encouraged to account for all salary increases posted by DHRD as the HPHA will only consider requests for wage increases as a result of wage increases to public officers and employees during the contract period or any option period that are not currently published.

c. RFP Amendments (Pg. 6)

HPHA reserves the right to amend the RFP at any time prior to the closing date in accordance with chapter 3-122, HAR. Interested offerors registered with the HPHA using the RFP Registration Form will be notified of all amendments through written communication which may include email, fax or USPS mail.

d. Rejection of Proposals (Pg. 7)

- i. The HPHA reserves the right to consider as acceptable only those proposals submitted in accordance with the requirements set forth in the RFP and demonstrate an understanding of the service specifications.
- ii. Proposals offering terms and conditions contradictory to those included in the RFP may be rejected.

e. Notice of Award (Pg. 7)

Notice of Award will be issued to the highest ranked Offeror. Successful Offeror will be required to enter into a formal written Contracts with the HPHA. See Attachments 1 – 6 for Sample Contract.

f. Protests (Pg. 7)

- i. Actual/prospective offeror may protest the solicitation or award of services only for a serious violation of procurement policies and operational procedures.
- ii. Protests shall be submitted in writing within 5 business days after the posting of an award.

g. Monitoring and Evaluation (Pg. 8)

- i. Performance shall be monitored and evaluated by the Contract Administrator or his designated representative, HUD, the HPHA auditors, the State Legislature, and/or other designated representatives.
- ii. Failure to comply with all terms or the Contract may be cause for suspension or termination as provided in the General Conditions of the Contract. See Attachment 7.

- h. General Conditions and Special Conditions of the resulting Contracts are provided as Attachments 6, 7, and 8. Be sure to review terms and conditions and submit written questions.

III. Section 2 – Scope of Work (Pg. 11)

a. Qualifying Requirements (Pg. 12)

- i. Prior to award of a Contract, furnish proof of compliance with requirements of section 3-122-112, HAR (Pg. 12) to include tax clearance, unemployment insurance, workers compensations, temporary disability insurance, prepaid health care and registered to do business in the State of Hawaii.

Instead of applying for paper certificate of compliances, Offeror may demonstrate compliance utilizing the Hawaii Compliance Express (HCE). HCE requires a \$12 annual subscription fee. Link to HCE provided on page 13 of RFP.0

- ii. Business office required in the State where it conducts business and where accessible in person or via telephone calls during normal Hawaii State government business hours from 7:45am to 4:30pm HST. See Attachment 11 for Hawaii State holidays (Attachment 7 listed on RFP, will be amended in addendum). An answering service is not acceptable. A permanent office location and phone number shall be stated in the offeror's proposal (Pg. 13).

- iii. Successful Offeror is required to defend, indemnify, and hold harmless the State of Hawaii, the HPHA, its elected and appointed officials, officers, and employees, from and against all liabilities arising out of or resulting from the acts or omissions of the Successful Offeror or the Successful Offeror's officers, employees, agents or subcontractors (Pg. 14).
- iv. Insurance requirements (Pg. 14)
 - Commercial General Liability with Personal Injury Liability: \$1 mil per occurrence for bodily and personal property damage and \$2 mil general aggregate; Personal injury liability limit of \$1 mil per occurrence.
 - Auto Liability covering all owned, non-owned and hired autos: \$1 mil bodily injury per person, \$1 mil per accident and \$1 mil property damage per accident; OR \$2 mil combined single limit.
 - Workers Compensation: limits as required by applicable State laws;
 - Successful offeror may use an umbrella policy in addition to the mandatory insurance policies to satisfy the minimum coverage limits (i.e. General Liability, Auto, and Workers Compensation) provided that the HPHA approves, and the umbrella policy follows the underlying coverage forms.
 - The State of Hawaii, HPHA shall be named as additional insured with respect to operations performed for the HPHA under the resulting Contract.
 - The HPHA is a self-insured State agency. The Successful Offeror's insurance shall be the primary. Any insurance maintained by the HPHA shall apply in excess of and shall not contribute with insurance provided by the Successful Offeror.
- b. Section 3 of the U.S. Housing Act of 1968 (Pg. 16)
 - i. To the greatest extent possible, ensure that employment and other economic opportunities generated by HUD assistance or HUD assisted projects, be directed to low- and very-low income persons, particularly persons who are recipients of HUD assistance for housing.
 - ii. With all things being equal, commit to a hiring preference for low- and very-low persons, which includes advertising the vacancies to this population.
- c. Contract Modification (Pg. 17)
 - i. Contract may be modified only by written documentation signed by both parties.
 - ii. At any time during the Contract term, the HPHA reserves the right to decrease the scope of services by removing properties under the awarded Contract as provided in the Termination of Convenience clause of the General Conditions (Attachment 7). In the event of a decrease in scope, the HPHA will provide 90 days advance notice to the Successful Offeror.
- d. An award will be issued for execution of one (1) contract for the services.

e. Initial term the contract will be for up to a 9-month period with up to 6 months of option to extend but may be less than 6 months when it is in the best interest of the State. The maximum length of the contract will be 15 months. Option to extend the contract shall be exercised at the sole discretion of the HPHA and are subject to the availability of funds.

f. Contract Price Adjustment Other than wage increases (Pg. 19)

Contract price adjustments shall be limited to liability, auto, workers compensation, and/or medical insurance premiums the conditions provided on page 19 must be met for consideration of a price adjustment.

g. Contract Monitoring & Remedies (Pg. 20)

- i. Ongoing monitoring performed by the Contract Administrator and his designated representatives.
- ii. If the Successful Offeror fails, refuses, or neglects to perform the services in accordance with the RFP requirements, the HPHA may request for written corrective action plan, a timeline for implementation, and the responsible parties. The HPHA also reserves the right to engage another company to perform the services to remedy the defect or failure and deduct such costs from monies due to the Successful Offeror or to directly assess the Successful Offeror. The HPHA may also utilize all other remedies provided under the resulting Contract and as allowable by law and rules.
- iii. Should the Successful Offeror continue to fail to comply with the requirements of the Contract, the HPHA reserves the right to engage the services of another company to perform the services, to remedy the defect or failure and to deduct such costs from the monies due to the Successful Offeror or to directly assess the Successful Offeror.
- iv. HPHA reserves the right to terminate any Contract without penalty for cause or convenience as provided in the General Conditions.

h. Scope of Services (Pg. 21)

- i. Consulting, Technical Assistance and Training Services:
 - Successful Offeror to conduct training, testing and technical assistance in the administration, management and operation of the Section 8 Housing Choice Voucher Programs, Section 8 Project Based Voucher Program, Veterans Affairs Supportive Housing Voucher Program, Home Ownership, Mainstream Vouchers, and Family Unification Program.
 - Successful Offeror will provide staff training on applications, eligibility, occupancy determinations, rent calculation, recertification for all voucher programs including outlining the differences between said programs based on regulatory requirements.
 - Successful offeror shall provide staff training on other HPHA policies and procedures which should include topics such as:

- i. Scheduling/notifying participants of annual reexamination.

- ii. Interim reexamination policies.
 - iii. Payment/Subsidy standards and utility allowances.
 - iv. Termination of assistance.
 - v. Empahsys reports used for annual and interim reexamination and FSS reporting.
 - vi. Income verification – using HUD’s Enterprise Income Verification, and third-party written verification.
 - vii. Tenant file organization/checklist, and sample documentation of sources of income.
 - viii. PIC system and reports, reconciling discrepancies in the data reported in Emphasys against HUD’s PIC system.
 - ix. Portability payments.
 - x. Family Self Sufficiency Program – Escrow calculations.
 - xi. Quality control procedures.
 - xii. Scheduling inspections.
 - xiii. HAP Contract, RFTA, and other pertinent forms.
 - xiv. Data entry into the Elite system.
- Successful Offeror shall be responsible for training materials and testing instruments.
 - Successful Offeror shall administer testing to evaluate staff knowledge.
 - Successful Offeror shall monitor and evaluate staff knowledge through file review, interviews/testing; providing training and one-on-one training.
 - Successful Offeror shall recommend reasonable staffing ratios for the Section 8 Voucher programs administrative staff.
 - Successful Offeror shall review and become familiar with HPHA’s statutes, Administrative Rules, and Section 8 Administrative plan to be able to answer questions regarding discretionary policies outline in said documents.
 - Successful Offeror shall conduct file audits of a minimum of 500 case files that are prepared after the initial training and shall, at the request of the HPHA, review files on a case-by-case basis up to an additional 500 files. The file audit shall include a list of errors and corrections necessary to bring the file into compliance with program regulations. Tenant case files will be made available electronically for access through a secured website.
 - Assist in the resolution of PIC errors while on-site and during the 9-month technical assistance period, including assisting with or participating in discussions with HUD to resolve errors.

The time frame for the work is as follows:

- a. All rent calculation and eligibility training and monitoring should occur over a two-week period on-site at the HPHA’s offices. The successful offeror may, however, propose a different length of time with an explanation of how their proposed timing would work and why it is more beneficial.
- b. The HPHA is requesting 9 months of technical assistance where the successful offeror would be available via teleconference, skype and/or email depending on what is determined to be the

most effective method of communication. Offerors proposals should anticipate up to 30 hours of technical assistance per month or a total of 270 hours for the 9 month period.

- c. The Successful Offeror shall conduct file audits of a minimum of 500 case files within 90 days and deliver files back to the HPHA within 3 days of completed review of each file. The remaining files, up to 500 additional files, may be reviewed over the duration of the contract.

ii. Personnel Requirements (Pg. 23)

- Minimum of three (3) years executive level management experience in the Section 8 housing choice voucher programs or equivalent.
- Minimum of three (3) years of training experience.
- Services to be provided at the HPHA's administrative offices on Oahu, Hawaii.
- Must be abreast of all federal regulatory or administrative changes to the Section 8 programs issued through HUD guidance, notices, or briefs.
- Must be knowledgeable regarding HUD's secure systems and reporting requirements.
- Must have experience using the Emphasys Elite system of managing tenant data.

iii. Management Requirements (Pg. 23)

- a. The Successful Offeror shall report directly to the HPHA's Section 8 Office.
- b. The Successful Offeror will be required to primarily perform the services at the HPHA Section 8 Office located on Oahu.
- c. The HPHA shall provide office space and access to general office equipment such as, telephone, fax machine, copier, and projector.

iv. Payment (Pg. 23)

- a. Compensation for Section 8 Housing Choice Voucher Programs, Section 8 Project Based Voucher Program, Veterans Affairs Supportive Housing Voucher Program, Homeownership, Mainstream Vouchers, and Family Unification professional training and testing services:
 - i. Training and testing fee as accepted in the price proposal. The training and testing fee shall be the all-inclusive cost to the HPHA, including all overhead and applicable taxes for delivery of services; and
 - ii. Allowable reimbursement of travel costs is subject to the following:
 - Coach class airfare;
 - Lodging not to exceed \$160 per day per person;
 - Per diem not to exceed \$50 per day per person; and

- Ground transportation for compact or sedan size rental car not to exceed \$60 per day OR actual cost of taxi fare.
- Actual costs above the allowable reimbursable travel rates shall be the responsibility of the Successful Offeror. The Successful Offeror shall obtain prior written approval from the HPHA for reimbursable travel cost deviations from the requirements and specified rates.
- Travel reimbursement claims shall include supporting documentation of expenses incurred.

b. Compensation for case file audits:

- i. The all-inclusive unit price to the HPHA, including all overhead and applicable taxes for delivery of the services for:
 - Completed review of a minimum of 500 case files and at the request of the HPHA, review files on a case-by-case basis up to an additional 500 files.
 - Other consultation services related to case file audits.
- i. Invoices shall be submitted for actual quantity of completed case file reviews.
- ii. The Successful Offeror shall itemize billing for services rendered for case file review to include service dates, AMP/MU No., tenant names, quantity of services rendered, unit price, and a total amount due.

c. Compensation for technical assistance:

- i. The all-inclusive unit price to the HPHA, including all overhead and applicable taxes for delivery of the services for:
 - Technical assistance on-site and during the 9-month technical assistance period.
 - 30 hours of technical assistance per month or a total of 270 hours for the 9-month period.
- ii. Invoices shall be submitted for actual hours of technical assistance services rendered.
- iii. The Successful Offeror shall include in the billing, hours of technical assistance services rendered, unit price, and a total amount due.

d. Separate invoices shall be submitted for each of the following services:

- i. Professional Training and Testing
- ii. Case File Audits

iii. Technical Assistance

- e. Section 103-10, HRS, provides that the HPHA shall have 30 calendar days after receipt of invoice or satisfactory delivery of goods or performance of the services to make payment. For this reason, the HPHA will reject any proposal submitted with a condition requiring payment within a shorter period. Further, the HPHA will reject any proposal submitted with a condition requiring interest payments greater than that allowed by section 103-10, HRS, as amended.
- f. The HPHA shall reimburse the Successful Offeror for all salaries, wages, related taxes, other related administrative expenses as agreed upon in the Contract.
- g. The STATE shall retain five percent (5%) from each monthly billing as a withholding until final settlement of the initial six (6) month period. The total withholding amount shall not exceed five percent (5%) of the total Contract amount.
- h. The Successful Offeror shall submit one (1) (amount will be amended to three (3) in addendum) original monthly invoice for services rendered to:

Hawaii Public Housing Authority
Section 8 Subsidy Programs Branch
P.O. Box 17907
Honolulu, Hawaii 96817

Pursuant to section 103-10, HRS, the HPHA shall have 30 calendar days after receipt of a proper invoice or satisfactory delivery of goods or performance of the services to make payment.

All invoices shall reference the Contract number assigned to the Contract. Payment shall be in accordance with section 103-10, HRS, upon certification by the Contract Administrator that the Successful Offeror has submitted the receipts for services specified.

- i. Invoices for the month of June shall be submitted to the HPHA by the 30th of June for payment processing in order to comply with the HPHA fiscal year-end close out process or unless otherwise approved by the HPHA.
- j. For final payment, the Successful Offeror must submit a valid original tax clearance certificate "Certification of Compliance for Final Payment" (SPO Form-22).

In lieu of the tax clearance certificate, an original tax clearance certificate, dated not over two (2) months old, with an original green certified copy stamp or a valid HCE Certificate of Vendor Compliance is acceptable.

A copy of Form SPO-22 is available at www.spo.hawaii.gov. Select "Forms for Vendors/Contractors" from the Chapter 103D, HRS link.

IV. Section 3 – Proposal Forms and Instructions (Pg. 28)

- a. General Instructions

- i. Submission of a proposal shall constitute the Offeror's indisputable representation of compliance with every requirement of the RFP.
 - ii. Submit one (1) original proposal marked "ORIGINAL" and four (4) copies of the proposal marked "COPY".
 - iii. Proposals shall be submitted in the prescribed format outlined in the RFP. A written response is required for each item unless indicated otherwise.
- b. Proposal forms and proposal application instruction provided on Pages 29 thru 31.
- i. See Attachment 14 for Proposal Submittal Checklist
 - ii. Proposal must include the following sections, clearly labeled and assembled in the order described; each section must be tabbed:
 - Title Page
 - Table of Contents
 - Background and Summary
 - Experience and Capability
 - Personnel: Project Organization and Staffing
 - Management Plan
 - Financial
 - Other
 - iii. Price Proposal/Financial (Pg. 33)
 - a. Price proposal shall be submitted for each service component for the initial period. See Attachment 13 for Sample Price Proposal Format. (attachment number will be referenced in addendum).
 - b. All proposed unit price(s) and one-time fees shall be the all-inclusive price for the HPHA, inclusive of personnel, overhead, and payroll/other applicable taxes in accordance with all applicable Federal, State and local rules and regulations.
 - c. Include travel narrative for Training services. Travel costs are not required to be included in the price proposal.

V. Section 4 – Proposal Evaluation and Award (Pg. 35)

- a. All proposals received will be reviewed for overall compliance with RFP requirements and to ensure submittal of all required attachments, certifications, forms, and narrative sections.
- b. Criteria for evaluation of proposals is provided on pages 35 – 37 of RFP, total possible is 100 points.
- c. During the evaluation, proposals shall be classified as acceptable, potentially acceptable, or unacceptable.

- i. The evaluation committee may rank the proposals and limit the priority list to three (3) responsible offerors. Discussions will be held with the priority listed offerors to promote understanding of the HPHA's requirements and the priority listed offerors proposals, and to clarify issues regarding their proposals before the best and final offer.
 - ii. If there are less than three (3) acceptable or potentially acceptable proposals, the HPHA shall not hold discussions with offerors who submitted unacceptable proposals.
- d. A single award will be made to the responsive and responsible offeror whose proposal conforms to the solicitation and determined to be most advantageous to the HPHA with consideration to price and other evaluation criteria set forth in the RFP (Pg. 39).
 - e. If there is only one responsible offeror submitting an acceptable proposal, an award may be made to the single offeror, rejected and a new request for proposals may be solicited if certain conditions are not met; the proposed RFP cancelled, or an alternative procurement method may be conducted pursuant to chapter 3-122-59, HAR.
 - f. The HPHA reserves the right to award a Contract on the basis of the initial offers received without discussion.

VI. Section 5 – Attachments (Pg. 41)

Be sure to review all contents and attachments in the RFP. By submitting a proposal, you'll be held responsible for all requirements to deliver the services. All changes to the RFP will be communicated through issuance of an addendum.

VII. Closing/Questions

Reminders:

- 3/4/2020 – Written Questions Due
- 3/6/2020 – Response to Written Questions
- 3/18/2020 4pm – Proposal Deadline

Sample Price Proposal
RFP SPB-2020-15

A. Professional Training and Testing

1. Training and Testing Fee:

Contract Term	Total Price for On-Site Training and Testing
9-Month Period	

2. Travel Narrative:

B. File Audits

Contract Term	Estimated No. of Files (A)	Price Per File Audit (B)	Total Price for File Audit (A x B)
9-Month Period	1000		

C. As-Needed Technical Assistance

Contract Term	No. of Technical Assistance Hours (A)	Rate Per Hour (B)	Total Price for Technical Assistance (A x B)
9-Month Period	270		

WAGE CERTIFICATE

SUBJECT: BID NO.: RFP SPB-2020-15

DESCRIPTION OF PROJECT

FURNISH PROFESSIONAL TRAINING, TESTING, AND TECHNICAL ASSISTANCE SERVICES FOR THE HAWAII PUBLIC HOUSING AUTHORITY'S VOUCHER PROGRAMS

Pursuant to Section 103-55, HRS, I hereby certify that if the awarded Contract is in excess of \$25,000.00, the services shall be performed under the following conditions:

1. The services shall be performed by employees at wages or salaries not less than wages or salaries paid to public officers and employees doing similar work.
2. The services shall be in compliance with all applicable laws of the Federal and State governments, relating to worker's compensation, unemployment compensation, payment of wages, and safety.

I understand that all payments required by Federal and State laws to be made by employers for the benefit of their employees are to be paid in addition to the base wages required by Section 103-55, HRS.

BIDDER: _____

BY: _____
Signature of Person Authorized to Sign this Bid

Please Print

NAME: _____

TITLE: _____

DATE: _____