



RFq 2015-8038; Answering Services

1.0 REQUEST FOR QUOTATIONS

Cincinnati Metropolitan Housing Authority (CMHA or the “Authority”) hereby solicits and requests quotes from qualified contractors (Offeror) to provide answering services. This request for price quotation is not an offer to buy and should not be assumed as such.

CMHA is a metropolitan housing authority organized and existing under Ohio Revised Code §3735.27, et seq., and is governed by the U.S. Housing Act of 1937, as amended, and subject to regulations under Title 2 and Title 24 of the Code of Federal Regulations.

2.0 SCOPE OF WORK (SOW); TECHNICAL SPECIFICATIONS (T/S):

The Contractor selected by the Authority will be required to follow the Authority policies as specified in this request, the Performance Based Contract and subsequent work orders.

2.1 General Requirements

2.1.1 Minimum Contractor Qualifications: Contractor selected shall be an established company with not less than five (5) years in business and five (5) years of experience in providing Telephone Answering and Message Services similar to the requirements identified herein.

2.1.1.1 Contractor(s) shall comply with all applicable federal, state and local laws, rules, regulations, ordinances and codes and obtain any licenses or permits required to provide the services under this solicitation.

2.1.1.2 Contractor shall furnish at their own expense, all labor, tools, equipment including but not limited to equipment required to have telephone, fax, email, and text capabilities, materials, and supplies, required to provide answering service tasks/functions for each AMP, as specified herein with no exceptions. This includes but is not limited to equipment needed to access the Authority property management software via a VPN connection required to enter data directly into the Elite (Emphasys) property management system - work order module.

2.1.1.3 Contractor shall pay all of its employees, including any and all approved subcontractors, at least the legal minimum wages as determined by the United States Department of Labor and the United States Department of Housing and Urban Development.

2.1.2 Contractor shall perform criminal history checks and drug screening tests on all prospective employees performing work under this RFq or coming onto a CMHA property and any resulting contract and provide summaries of the results to the Authority if requested. For the purposes of this section, the term “employees” includes contractor. Prospective employees whose criminal background check discloses a misdemeanor or felony involving crimes of moral turpitude, sexual offenses or harm to persons or property shall not be employed to perform work under this RFq or any



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resulting contract. Contractor is required to perform drug screening of all employees and to ensure acceptable test results. Criminal history and drug screening checks will be completed at the sole expense of the contractor. Any employee of the Contractor suspected of being under the influence of drugs and or alcohol will be reported to the Authority's Compliance and Safety Operations Department and/or other local law enforcement. If the employee is determined to be under the influence of drugs or alcohol in any form or manner, or believed by proper authority to be dealing in illicit sale of alcohol or drugs they will be removed and shall not be allowed to return to any job site on the Authority's property. The Contractor's contract may be suspended and/or terminated should such a situation occur or if the Contractor fails to submit results pursuant to this section.

- 2.1.3** Contractor's personnel shall conduct all work in a professional manner, even when dealing with residents, staff or other callers in high stress situations.
- 2.1.4** Contractor shall replace any employee deemed unacceptable by the Authority, within two (2) business days.
- 2.1.5** The Contractor receiving an award may be required to attend meetings in Cincinnati with Property Management, at no additional cost to the Authority.
- 2.1.6** All work must be done within the continental United States. All firms are invited to submit a response regardless of their country of origin, however, the call center and the operators handling the calls must be physically located within the continental United States.

2.2 Telephone Answering and Message Services

- 2.2.1** Contractor to provide telephone answering and message services for off-hours periods on a daily basis, weekends and holidays included. Services will be required 365 days per year.
- 2.2.2** Contractor must prepare a daily, detailed spreadsheet of messages and forward to the Authority, by no later than 7:30 a.m. on the morning following a daily message period. All reports shall be sent via email.
- 2.2.3** Contractor shall have sufficient properly trained, experienced and dependable staff to meet the contract needs in a timely and technically acceptable manner.
- 2.2.4** Contractor's personnel shall conduct all work in a professional manner, even when dealing with residents, staff or other callers in high stress situations.
- 2.2.5** Contractor is required to answer all incoming calls during off-duty hours, office closures, and holidays. Approximately 500 to 600 calls can be received during peak months.
- 2.2.6** Contractor shall provide qualified Bilingual English/Spanish operators, at all times, to perform the work required of this RFq and any resulting contract.



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- 2.2.7** Contractor shall maintain the ability to provide service to hearing impaired clients.
- 2.2.8** All incoming calls shall be answered by the third ring.
- 2.2.9** Contractor shall answer calls with the following phrase: “Thank you for calling Cincinnati Metropolitan Housing Authority. This is the Answering Service. How may I be of assistance?”
- 2.2.10** Contractor shall record the following from each caller:
 - Tenant’s name
 - Caller’s name (if different than Tenant)
 - Caller’s phone number
 - Development
 - Caller’s unit number and/or address
 - Location within unit, i.e. bedroom, living room, etc.
 - Caller’s concern(s) or inquiry (Provide specific details including description of problem and location)
- 2.2.11** All messages on the spreadsheet report must be clear and concise to the satisfaction of the Authority. There shall be no need for clarification or interpretation on the message content.
- 2.2.12** Reports of dispatch calls shall clearly indicate all calls made for dispatch to on-call personnel and clearly indicate the successful delivery of the dispatch, the time of the delivery of the dispatch message, and the name of the individual contacted. If more than one dispatch call is required, the report shall list the time and status of each call.
- 2.2.13** All calls shall be recorded and available to the Authority upon request at no additional cost.
- 2.2.14** Contractor shall provide the Authority with a monthly activity/invoicing report for each AMP. The spreadsheet shall contain at a minimum, the following information:
 - List of AMPs
 - Number of calls per AMP
 - Number of e-mails per AMP
 - Additional information for inclusion in report may be requested by the Authority.
 - Cost per call
- 2.2.15** Contractor shall inform the Authority within two (2) working days of any change in contact information, including but not limited to contact personnel, mailing addresses, physical address, phone numbers and email addresses.
- 2.2.16** Contractor shall have sufficient financial resources to successfully provide the scope of services identified herein, including the identified permissible billing frequency.
- 2.2.17** Contractors shall enter data directly into the Authority Elite (Emphasys) property management software - work order module. If there is an Emergency, the On-Call Maintenance Supervisor will assign a work order.



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If there is a routine work order, the property manager or maintenance supervisor will assign the work order. Contractor will provide caller with an Elite (Emphasys) generated Work Order number.

2.2.18 The following information at a minimum must be entered into the Authority Elite (Emphasys) property management software - work order module

- ☐ Tenant Name
- ☐ Address
- ☐ Development
- ☐ Unit Number if applicable
- ☐ Phone Number
- ☐ Description of maintenance problem and location

2.2.19 If the situation is not an emergency, the Contractor shall create a routine work order in Elite (Emphasys).

2.2.20 The Authority will provide the contractor an On-Call Maintenance Supervisor schedule. Schedule shall be provided to the contractor 48 hours prior to the next month. Contractor will accept changes to the On-Call Maintenance Supervisor schedule via e-mail from the Authority.

2.2.21 Selected contractor must have everything in place to start providing services on November 1, 2015.

2.3 Work Hours

2.3.1 Normal work hours for the Authority are from 8:00 – 4:30 p.m. Monday through Friday, except holidays. Transfer from the Authority to answering service will normally occur between 4:15 p.m. and 4:30 p.m., Monday through Friday. Transfer from answering service back to the Authority will occur between 7:45 a.m. and 8:00 a.m., Monday through Friday. Generally, services to be provided hereunder will be at days and times other than the Authority normal work hours. There may be times when services will be required during the Authority's normal working hours.

2.3.2 The Authority holidays are as follows:

- New Year's Day
- Martin Luther King Jr. Day
- President's Day
- Good Friday
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Veteran's Day
- Thanksgiving Day
- The day after Thanksgiving
- Christmas Eve/Day



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2.3.3 Contractor is required to answer all incoming calls during normal business hours when staff is out of the office.

- There will be times that the Authority staff notifies the Contractor they are forwarding calls. The Authority staff will provide the Contractor with emergency cell numbers.
- If there is no answer or the maintenance supervisor fails to respond to the Contractor calls within five (5) minutes, the Contractor shall contact the manager of that property.

2.4 Emergency Determination

2.4.1 Contractor shall determine if the call is a legitimate emergency by referring to Attachment E. In addition, any call that suggests it could involve health, life, safety or imminent damage to property, will be considered an emergency. Staff answering calls shall ask questions of the caller to determine the true nature of the call, if it is not readily apparent.

2.4.2 If the call is regarding a legitimate emergency, the Contractor shall verify the status of the emergency call to 911 emergency dispatch services. The answering service shall verify whether or not the caller has called 911. The answering service personnel shall make sound judgment decisions on a case basis to place a 911 call when circumstances warrant such action.

2.4.3 If the situation is an emergency

2.4.3.1 Contractor shall contact the appropriate On-Call Maintenance Supervisor via cell phone. If the On-call Maintenance Supervisor does not respond within 10 minutes, Contractor shall contact the Maintenance Supervisor by cell phone. A list of developments with the On-Call cell numbers will be provided to the Contractor. Contractor shall continue up the call list for that property until contact is made, even if this requires escalation to the level of the Assistant Director.

2.4.3.2 For calls received after hours, holidays or weekends, Contractor shall e-mail no later than 8:00 a.m., on the next business day all information received from the previous shift. This shall include at a minimum, the name of the person contacted at the Authority to respond to the emergency situation, time and date of call, along with all detailed information regarding the call. This e-mail shall also include details of any problems or concerns that arose with the call, such as difficulty in making contact with the listed on-call staff for the property and steps that were taken to resolve the situation.

2.4.4 If the situation is not an emergency

2.4.4.1 Contractor shall inform the caller that the information will be forwarded to the Authority on the next business day and that the work order center will generate a work order.



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2.4.4.2 In situations when the phones are forwarded during office hours, the messages shall be forwarded within one hour upon return of staff or the next business day with the exception of all emergencies.

2.5 Performance Standards

2.5.1 Service fees will be reduced 10% for any service not meeting these requirements.

2.5.2 The Contractor shall be obligated to pay the Authority the sum of twenty-five and no/100 dollars (\$25.00) per day for each day that the Contractor fails to submit the daily report in accordance with the RFP.

2.5.3 The Senior Manager of Asset Management Services may waive a fee reduction at their discretion after discussing extenuating circumstances with the Contractor. Such waiver shall be in writing at the time of the service.

2.6 Invoices

2.6.1 Contractor shall not perform any services without a Purchase Order or a Purchase Order Number. If Contractor performs services without a Purchase Order, CMHA shall not be required to pay Contractor for those services or materials.

2.6.2 All invoices must have a valid PO number.

2.6.3 All Invoices must include service dates in the description of the service. Invoices shall not be backdated; the date on the invoice shall match the date the invoice is submitted to CMHA or the date the invoice is placed in the mail. Invoices which are not dated in accordance with this section will be rejected and the Contractor will need to submit a revised invoice to receive payment.

2.6.4 All invoices must be submitted within two weeks for services performed with the exception that invoices for emergency services shall be submitted within 24 hours. No Contractor may invoice for services not rendered. Contractors violating this section may be terminated.

2.6.5 CMHA will not pay invoices until services are fully completed as scheduled.

2.7 Indefinite Quantities Contract (IQC) - The Authority does not guarantee any minimum or maximum amount of work as a result of any award ensuing from this RFq.



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2.7.1 Guaranteed Contract Minimum Amount and Not-to-exceed

Maximum Amount: As may be further detailed herein, as the ensuing contract will be an Indefinite Quantities Contract (IQC), which, pursuant to HUD regulation, requires the Authority to award the responsive and responsible contractor a Guaranteed Contract Minimum Amount (GCMA) and Not-to-exceed Maximum Contract Amount (NMCA) of work, those required minimum and maximum contract levels are: (a) GCMA: \$100; (b) NMCA: \$50,000.

3.0 ECONOMIC INCLUSION

This request for quote is subject to the requirements of Section 3 of the Housing and Urban Development Act of 1968, as amended. Preferences may be given in accordance with 24 CFR 135 and the CMHA procurement policy.

Contractor shall utilize Section 3 residents as defined in Attachment C to perform the requirements under this RFq to the greatest extent feasible and shall document such efforts quarterly. There is a 30% goal for hiring Section 3 residents on any contract(s) resulting from this RFq. Contractors will be evaluated on its performance at achieving this goal and such evaluation shall be a factor in future awards.

Any Section 3, MBE, SBE, or WBE qualified vendor should state specifically such status. Quotes from small business enterprises and minority business enterprises are encouraged.

For any questions related to economic inclusion, please contact Robert Bell, Economic Inclusion Coordinator, at robert.bell@cintimha.com.

4.0 ADDENDUM

All questions regarding the RFq and requirements must be submitted in writing to Janell.duncan@cintimha.com prior to **4:00 PM on September 15, 2015**, and will be answered as addendum and posted to the Authority website. Questions will be answered prior to **4:00 PM on September 18, 2015**, in an addendum posted on the Authority's website at cintimha.com under the Business Opportunities page.

5.0 DEADLINE

All quotes must be submitted to the Procurement Office by **10:00 AM** (local time) on **September 23, 2015**. Quotes may be emailed to janell.duncan@cintimha.com or mailed or hand delivered to 1627 Western Avenue, Cincinnati, OH 45214.

6.0 QUOTE FORMAT

All quotations should consist of, at a minimum:



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- A. A completed Fee Submission Form (Attachment A).
- B. A list of references (Attachment B). Provide at least five (5) customer references. Include customer business name, phone number, and contact name.
- C. A summary of the company's relevant experience, the company's project management ability, and financial capacity as described below (Section 7.0 Award Criteria).
- D. Section 3 Business Preference Documentation (Attachment C).
- E. Copies of licenses applicable to the scope of work of this RFq (if any).

7.0 AWARD CRITERIA

Award shall be made to the responsive and responsible contractor(s) that submits the best value to the Authority using price and other factors listed below as determined by a committee of Authority employees. Factors which will be considered include: fees, relevant experience, project management ability, and financial capacity.

7.1 The following evaluation criteria will be utilized to evaluate each proposal:

- 5 = Excellent
- 4 = Above Average
- 3 = Average
- 2 = Below Average
- 1 = Poor
- 0 = Non-Responsive

NO	POINTS	WEIGHTED AVERAGE	FACTOR DESCRIPTION
1	0-5	40%	The PROPOSED COSTS to provide the services requested
2	0-5	20%	Relevant Experience: Firm's experience in the operation of projects of this or greater scope. The evaluation of this criterion will be based upon Attachment B – Professional References and the company's <u>one-page description of the company's related experience</u> .
3	0-5	20%	Project Management Ability: Project Manager and staff's expertise, include resumes of project manager and key staff who will be assigned work under this contract.
4	0-5	20%	Financial Capacity – include a balance sheet or other financial document. The document will reflect the proposer's ability to complete this work without risk to CMHA of financial insolvency. In lieu of a balance sheet, a certified



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			written statement from your bank is acceptable.
		100 %	Sub-Total Points (other than Economic Inclusion points)

NO.	POINTS	FACTOR TYPE	FACTOR DESCRIPTION
			Economic Inclusion Participation: A firm may qualify for Section 3 status as detailed within Attachment C and may also qualify as a DBE/MBE/WBE and SBE as certified by the City of Cincinnati, the State of Ohio MBE/WBE registration board and/or any other governmental certification entity. Active certification must be included with the proposal to receive additional points. (Note: a maximum of 10 economic inclusion points may be awarded)
5a	3 points	Section 3	Category I & II: As detailed in <i>Attachment C</i> ; <u>or</u>
5b	1 points		Category III & IV: As detailed in <i>Attachment C</i> .
5c	3 points		Demonstrative Section 3 Action Plan
5d	3 points	DBE/MBE/WBE/SBE	Certification by a professional diversity organization and/or governmental certification entity.
	10 points possible		Maximum Economic Inclusion Points (Additional)

	110 points	Total Possible Points (Including Economic Inclusion Points)
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8.0 CONTRACT

The Authority will not execute a contract on the successful proposer's form of contract. See *Attachment D* for Small Purchase General Terms and Conditions. By submitting a response the successful proposer agrees to the terms in this RFq and the attachments. A Notice of Contract Commencement will be sent to the successful contractor. Alternatively, CMHA may utilize a



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different form of contract; by submitting a response the successful proposer agrees to execute CMHA's form of Contract.

All contract documents, including any contractor supplied agreements shall be reviewed by the Procurement Officer and Contracting Officer prior to execution. The Authority intends to enter into a 12-month contract with the selected Contractor. At the Authority's sole discretion two one-year contracts ("options") may be extended for a maximum total of three (3) years. Please note that contracts are limited to \$50,000.00 over the term of the contract.

9.0 RIGHT TO REJECT QUOTES

CMHA reserves the right to reject any or all quotes, to waive technicalities, and to accept any quote deemed to be in its best interest. CMHA also reserves the right to seek additional or new quotes and to waive informalities and minor inequities in quotes received.

It shall be clearly understood that all services requested in this RFq in no way constitute a guarantee of the level of effort that may be requested of the successful Offeror(s), or guarantee a certain value.