



Andrew M. Cuomo, Governor

Homes and Community Renewal

Ruthanne Visnauskas, Commissioner/CEO

Request for Bids for Section 8 Housing Choice Voucher Training Consultant Services

Bid Issuance Date:	August 8, 2019
Deadline for Submission of Questions:	August 15, 2019, 12PM EDT
Bid Submission Deadline:	August 22, 2019, 12PM EDT

RFB Number: HTFC-RFB-20190808

HOUSING TRUST FUND CORPORATION
HAMPTON PLAZA
38-40 STATE STREET ▪ ALBANY, NEW YORK 12207
www.hcr.ny.gov

Bid Submission Checklist

CHECKLIST OF REQUIRED ITEMS FOR A COMPLETE BID SUBMISSION

- Application Coversheet
- Cover Letter
- Bid Submission which includes a detailed Workplan and requirements outlined in Sections 10(iii) and (iv) of this RFB
- Cost Proposal Form as outlined in Exhibit B of this RFB

Administrative Forms

- [Vendor Information Form](#)
- [Lobbying Reform Law Form 1](#)
- [Lobbying Reform Law Form 2](#)
- [Non-Collusive Bidding Certification Form](#)
- [Vendor Responsibility Questionnaire – For Profit Business Entity](#) OR [Non-Profit Entity](#);
- [EEO Staffing Plan, PROC-1](#)
- [Utilization Plan, PROC-2](#)
- [MWBE & EEO Policy Statement, PROC-4](#)
- [Company Demographic Profile, PROC-7](#)
- [EEOC Statement, PROC-8](#)
- Evidence of Insurance (required upon contract award)
- Conflict of Interest Statement
- Statement regarding Disclosure of Commission Findings
- Bidder's most recent two years of financial statements or federal tax returns

Application Coversheet

Attach this form to the top of your Bid Submission.

DATE OF APPLICATION:

GENERAL INFORMATION ON FIRM:

Legal Name of Firm:

Firm's Mailing Address:

Firm's Website:

Firm's Main Telephone Number (including area code):

Federal Tax ID Number:

SEC Registration Number (if applicable):

MBE Registration Number (if applicable):

WBE Registration Number (if applicable):

MWBE Registration Number (if applicable):

MAIN CONTACT INFORMATION FOR THIS BID SUBMISSION:

Please list the individual that will be the main contact *regarding this Bid Submission*.

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

PRINCIPAL IN CHARGE:

Please list the primary staff person(s) who will provide services relating to the Housing Trust Fund Corporation. Attach additional sheets if necessary.

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

ADDITIONAL CONTACTS (if applicable):

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

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HOUSING TRUST FUND CORPORATION

Request for Bids for Section 8 Housing Choice Voucher Training Consultant Services

IMPORTANT NOTICE: A Restricted Period under the Lobbying Procurement Law is currently in effect for this procurement process and will remain in effect until approval of the Contract. Bidders are prohibited from Lobbying Procurement Law Contacts related to this procurement process with any employee of the Housing Trust Fund Corporation (“HTFC”), or its Affiliates¹, other than the Designated Contact Officer listed below.

Lobbying Procurement Law Designated Contact Officer:

Stacey C. Mickle
New York State Homes and Community Renewal
Housing Trust Fund Corporation
38-40 State Street
Albany, New York 12207
Email: Stacey.Mickle@nyshcr.org

If you have inquiries regarding this request for bids or would like to contact HTFC regarding matters not relating to Lobbying Procurement Law Contacts, please contact Lisa G. Pagnozzi, via email, at Lisa.Pagnozzi@nyshcr.org. Further information regarding HTFC’s Lobbying Procurement Law policies is available in [HTFC’s Standard Clauses and Requirements for Solicitations](#), hyperlinked herein as Exhibit A.

1. Introduction

[New York State Homes and Community Renewal](#) (“HCR”) consists of all the major housing and community renewal agencies of the State of New York (“State”), including the Housing Trust Fund Corporation. HCR includes other State agencies not involved in this Request for Bids (“RFB”) process.

2. Purpose

HTFC seeks competitive bids and statements of qualifications from qualified firms or individuals (referred to hereinafter as “Bidders”) for the provision of Section 8 Housing Choice Voucher Training Consultant Services. The successful Bidder (the “Consultant”) will provide new trainings and information to HCR employees and stakeholders, which shall include the Consultant Services further defined in the Scope of Services section of this RFB.

This RFB is subject to HTFC’s [Standard Clauses and Requirements for Solicitations](#), hyperlinked herein as Exhibit A.

¹ Affiliates shall mean New York State Housing and Community Renewal, New York State Housing Finance Agency, New York State Affordable Housing Corporation, State of New York Mortgage Agency, State of New York Municipal Bond Bank Agency and Tobacco Settlement Financing Corporation.

3. Overview of the Housing Trust Fund Corporation

The [Housing Trust Fund Corporation](#) was established in 1985, under §45-a of the State’s Private Housing Finance Law, as a subsidiary public benefit corporation of the New York State Housing Finance Agency. HTFC’s mission is to further community development through the construction, development, revitalization and preservation of low-income housing, the development and preservation of businesses, the creation of job opportunities, and the development of public infrastructures and facilities.

For further information regarding HCR’s programs, visit our website at <http://hcr.ny.gov>.

3.1 Overview of the Section 8 Housing Choice Voucher Program

The U.S. Department of Housing and Urban Development (“**HUD**”) provides funding to HTFC through an Annual Contributions Contract (“**ACC**”) to administer Section 8 Housing Choice Vouchers (“**HCVs**”). Although there are more than 100 Public Housing Authorities (“**PHAs**”) in the State, HTFC is the only PHA that is permitted to administer HCVs statewide. HTFC makes Housing Assistance Payments (“**HAPs**”) to landlords on behalf of more than 44,000 extremely low and very low-income families across the State, providing more than \$450 million in federal subsidies annually. HTFC administers vouchers in New York City, primarily utilizing State staff based in its downtown Manhattan office.

HTFC contracts with Local Administrators (“**LAs**”) who each serve as the entry point to the program in one or more of 54 counties. These LAs are either not-for-profit organizations, local governments, or private vendors. Each LA employs its own case managers and inspectors who perform intake and upload data into HTFC’s central Statewide Housing Choice Voucher System (“**SHCVS**”) monthly. The SHCVS collects information required to determine tenant eligibility, calculate rental subsidies, and verify payments to landlords. It also provides a digital version of HUD’s Form 50058 and other forms necessary to capture required tenant and landlord information.

4. Assessment of Practices relating to Diversity and Service-Disabled Veteran Owned Business Enterprises (“SDVOBs”)

HTFC has determined, pursuant to New York State Executive Law Articles 15-a (Article 15-A) and 17-b (Article 17-B), respectively, that the assessment of participation by minority- and/or women-owned business enterprises (“**MWBEs**”) (assessment of participation by MWBEs hereinafter referred to as “**Diversity**”) and SDVOB practices of Bidders responding to this RFB is practical, feasible, and appropriate.

4.1 Minority- and/or Women-Owned Business Enterprise Participation

HTFC is committed to awarding contracts to firms that are dedicated to Diversity and provide high-quality services. HTFC strongly encourages firms that are certified as MWBEs by the State’s Empire State Development (“**ESD**”) to submit responses to this RFB.

HTFC is required to implement the provisions of Article 15-A and 5 NYCRR, Parts 142-144 (MWBE Regulations) for all contracts of HTFC, as defined therein, with a value exceeding \$25,000. HTFC strongly encourages joint ventures of MWBE firms with majority firms and with other MWBE firms. For assistance identifying MWBE partners, review the [NYS MWBE Directory of Certified Firms](#).

For purposes of this solicitation, HTFC hereby establishes an overall goal of 30% of total contract expenditures for MWBE participation, 15% for minority-owned business enterprises (“MBEs”) and 15% for women-owned business enterprises (“WBEs”).

4.2 Service-Disabled Veteran-Owned Business Enterprise Participation

HTFC is committed to awarding contracts to service-disabled veteran-owned business (“SDVOBs”) that provide high-quality services. HTFC strongly encourages firms that are certified as SDVOBs by the State’s Office of General Services (“OGS”) to submit responses to this RFB.

HTFC is required to implement the provisions of Article 17-B for all HTFC contracts, as defined therein, with a value exceeding \$25,000. For assistance identifying SDVOB partners, refer to the [Directory of New York State Certified Service-Disabled Veteran-Owned Businesses](#).

For purposes of this solicitation, HTFC hereby establishes a goal of 6% of total contract expenditures for SDVOB participation.

5. Calendar of Events and Milestones

It is anticipated that a contract will be awarded in response to this RFB based on the following schedule:

Event	Date
Issuance of RFB	August 8, 2019
Deadline for RFB Questions	August 12, 2019, 12PM, Eastern Daylight Time
Deadline for Responses to RFB Questions	August 19, 2019
Deadline for Submission of RFB Bids	August 22, 2019, 12PM, Eastern Daylight Time
Anticipated Selection Date	September 2, 2019

HTFC reserves the right to modify this schedule at its discretion. Notification of changes in connection with this RFB will be made available to prospective Bidders via electronic email.

6. Scope of Services & Deliverables

The Consultant will be expected to hold the following trainings at one sole location at 25 Beaver Street in New York City (the “**Training Location**”), which serves as the location for the New York City Local Administrator and the main office for the New York State Housing Choice Voucher Program.

The Consultant will be expected to provide each training session, for Courses 6.1 through 6.5, at least once a year, but shall not exceed four trainings per year. In addition, the Consultant will make a presentation at the Housing Choice Voucher Program Regional Annual Meeting (“**Regional Meeting**”) which is held at HTFC’s Albany office, as further outlined in Section 6.6 of this RFB.

- 6.1 Housing Choice Voucher Housing Specialist Training Certification
- 6.2 Housing Choice Voucher Project Based Voucher Training Session (exam and certificate optional)
- 6.3 Housing Choice Voucher Specialist Refresher Training Session
- 6.4 Low Income Housing Tax Credits Training Session
- 6.5 Section 8 Management Assessment Program (“**SEMAP**”) Training Session
- 6.6 Housing Choice Voucher Program Regional Annual Meeting

The chart below outlines expected start dates for the 2019 training sessions and the Regional Meeting:

Training Session	Length of Training Session	Number of Participants	Training Periods
6.1 Housing Specialist Training Certification	5 Days	No more than 15 participants	Monday, September 30, 2019 – Friday, October 4, 2019 or Monday, October 7, 2019 – Friday, October 11, 2019
6.2 Housing Choice Voucher Project Based Voucher Training Session (exam and certificate optional)	3 Days	No more than 15 participants	The start date of this training is contingent upon the start of the Housing Specialist Training. If the Housing Specialist Training starts the first week in October, the Project Based Voucher training will start the second week in October. If the Housing Specialist Training starts the second week in October, the Project Based Voucher training will start the third week in October.
6.3 Housing Choice Voucher Specialist Refresher Training Session	3 Days	No more than 10 people	Monday, November 4, 2019 -Friday, November 8, 2019 or Monday November 11, 2019 – Friday, November 15, 2019
6.4 Low Income Housing Tax Credits Training Session	2 Days	No more than 10 people	The start date of this training is contingent upon the start of the 6.3 training session. The 6.4 training will commence after the 6.3 training session concludes.

6.5 Section Eight Management Assessment Program (SEMAP)	1 Day	No more than 10 people	Monday, March 2, 2020 – Tuesday, March 31, 2020
6.6 Housing Choice Voucher Program Regional Annual Meeting	Half Day	100-120 people	May 2020 (exact date to be determined)

Below please find the topics HTFC’s requires the Consultant to cover during each training session:

6.1 Housing Choice Voucher Specialist Training Session

The purpose of this training is to ensure that newly-hired case managers are properly trained on the HCV Program’s rules and regulations as well as the role and responsibility of a case manager. At the conclusion of the training session, all participants will be required to take the HCV Specialist exam. If a participant fails the exam, then they will be required to re-take the exam. The Deputy Director for the New York City Local Administrator will advise the participant and the Consultant of the date for the re-exam. The Consultant shall cover the content below during the 5-day HCV Specialist Training session:

- Waiting List Management;
- Eligibility Determinations;
- Annual and Interim Re-Certifications;
- Income, Allowance, and Rent Calculations;
- Lease Renewals and Rent Increases;
- Voucher Issuance and Leasing;
- How to conduct a rent increase;
- Moves and Portability;
- Mandatory Use of PIC, EIV, and IVT;
- Terminations and Denial of Assistance;
- Housing Quality Standards (HQS) and Inspections;
- Section 8 Management Assessment Program (SEMAP); and
- Fair Housing and Reasonable Accommodations.

6.2 Housing Choice Voucher Project Based Voucher Training Session

The Training Location serves as the co-location for the offices of the New York City Local Administrator and the main office for the New York State Housing Choice Voucher Program. There are over five staff in the New York City office who are not a part of the New York City Local Administrator’s office, but they are a part of the team that the program refers to as central or statewide staff. The role of the statewide staff is to assist with the administration of the HCV Program throughout New York State. Statewide staff roles consist of Deputy Directors, program managers, statewide program coordinators and statewide program auditors.

The Housing Choice Voucher Project Based Voucher (“**PBV**”) Training would be for program managers and supervisors. The topics covered during the training shall include but not be limited to:

- Implementation and administration of PBV’s and RAD PBV’s;
- Process for applying for PBV’s and RAD PBV’s;

- Process before a PHA issues a contract to a developer;
- Compare and contrast tenant-based vouchers, project-based vouchers and RAD project-based vouchers;
- Required information the PHAs 5-year plan; and
- Providing updates on current PBV regulations, the role of the PHA versus the role of the proposer, contract requirements, similarities and differences between tenant-based vouchers, PBV and RAD PBV, applying for RAD, and RAD requirements for the five-year and administrative plans, required reviews, initial rents and rent adjustments (specifically the USDA process to increase rent costs), overview of tax credits utility allowances, annual and interim recertifications, increases in tenant income, inspections, terminations, reporting to VMS, action plan for the PBV program.

After completion of this 3-day course participants will be provided with the option to take the Project Based Voucher Specialist Exam.

6.3 Housing Choice Voucher Specialist Refresher Training Session

Participants attending the Housing Choice Voucher Specialist Refresher training have previously completed the five-day Housing Choice Voucher Program Specialist Training. The purpose of this training is for the Consultant to review specific program areas selected by the Deputy Director for the New York City Local Administrator and the Director of the Housing Choice Voucher Program.

Below please find the topics selected to be covered but not limited to:

- Fair Housing and Determining Reasonable Accommodations;
- Rent calculation including public assistance rents;
- HUD EIV and IVT;
- How to calculate rent increases;
- Regulations regarding the use of social media for background check purposes or to investigate potential fraud;
- HUD Subsidy Standards Regulations; and
- HUD Portability Policy and Procedures.

6.4 Low Income Housing Tax Credits Training Session

The Low-Income Housing Tax Credits (“LIHTC”) training session is designed for program managers and executive staff. The purpose of this training is to provide guidance on federal rules regarding how LIHTC’s work and the role the PHA when administering vouchers to such properties. Training topics shall cover the following:

What is Low-Income Housing Tax Credits (LIHTC) and how does it work?

- Purpose of LIHTC’s;
- Role of LIHTC investors; and
- Rules and Regulations for PBVs in a LIHTC properties.

PBV units in a LIHTC property the regulation concerning:

- Process to request rent increases;
- Household becomes income ineligible;

- Disabled households residing in a PBV unit that becomes ineligible, due to income and or change in household composition; and
- Ineligible PBV unit effect on a tax credit benefit. Impact on the owner after the contract is executed.

6.5 Section Eight Management Assessment Program (SEMAP) Training Session

The Section Eight Management Assessment Program (“**SEMAP**”) measures the performance of the public housing agencies (“**PHAs**”) that administer the Housing Choice Voucher program in 14 key areas. SEMAP helps HUD target monitoring and assistance to PHA programs that need the most improvement.

The SEMAP training is mandatory for the Housing Choice Voucher statewide auditors. However, statewide staff who are not audits are permitted to attend the training. There will be at least 3 people in the training session but no more than 10. The purpose of this training session is to ensure uniform training and ensure staff are properly conducting SEMAP Audits. The training will be held at 38 Hampton Plaza in Albany, NY. This will be a one-day training. The SEMAP training will occur annually.

The Consultant shall cover the following content:

- Explain the SEMAP Process;
- In-depth review of the SEMAP Indicators and scoring; and
- How to conduct exist interviews.

6.6 Housing Choice Voucher Program Regional Annual Meeting

The New York State Housing Choice Voucher Program holds the NYS Housing Choice Voucher Regional Meeting annually. This is a mandatory meeting for all 41 Local Administrators. The total number of attendees is approximately 100-120. The purpose of the Regional Meeting is to provide program and policy updates to the Local Administrators. Regional Meetings are conducted at HTFC’s Albany office at 38-40 State Street, Albany New York 12207. The presenters at the Regional Meeting are typically the NYS Housing Choice Vouchers Program Director, Deputy Directors and Program Managers. The Director meets with statewide staff management and program staff to determine the agenda for the regional meeting. In addition, the Housing Choice Voucher Task Force, which consists of 7 Local Administrators representing 7 regions of New York State, provide their recommendations for the agenda. The regional meeting typical begins at 9:00am and concludes at 1:00pm.

The format for the regional meetings varies depending on confirmed topics in accordance with the meeting/presentation styles outlined below:

1. Meeting Style One:

- a. Meeting agenda and materials to be distributed to Local Administrators prior to the meeting;
- b. Meeting to be conducted in one large meeting space;
- c. Refreshments provided;
- d. Audio and Visual equipment setup; and

- e. Each presenter on the agenda is provided at least 30 minutes to present their topic.

2. **Meeting Style Two:**

- a. Meeting agenda and materials to be distributed to Local Administrators prior to the meeting;
- b. Meeting to be conducted in one large meeting space – followed by breakout sessions.
- c. There are approximately 4 to 5 breakout sessions covering various topics. The breakout sessions are set up with one or a panel of two or more speakers. Each workshop lasts approximately 45 minutes.

The Consultant will be required to present at the regional meeting on at least one topic that will be determined by the Director of the Housing Choice Voucher Program.

7. Insurance Requirements

The Consultant and its subcontractors, if any, are required to provide and maintain, at its sole cost and expense, the insurance requirements at the minimum limits specified herein during the term of the contract and for two (2) years after completion of work. All required insurance policies shall be maintained with insurance companies licensed within the State of New York and holding an AM Best rating of no less than A- VIII. Said policies shall contain a provision that coverage will not be canceled, non-renewed or materially changed, until at least thirty (30) days' prior written notice has been provided to HTFC and any and all other parties-in-interest as HTFC may designate in writing from time to time (collectively, the "**Additional Insureds**"), all as their interests may appear, shall be named as additional insureds. Consultant(s) (and its sub-consultants, if any) agrees to have included in each of the above policies for Consultant's Parties, a waiver of the insurer's right of subrogation against the Additional Insureds.

The Consultant (and its subcontractors, if any) shall furnish to HTFC evidence of the following insurance requirements prior to execution of awarded Agreement:

- A. Worker's Compensation Insurance and Disability Benefits Coverage providing statutory benefits for the Consultant and the Consultant's Parties' (defined as the Consultant and those working on its behalf being, i.e., subcontractors and vendors) employees and Employer's Liability coverage in an amount that is no less than Five Hundred Thousand Dollars (\$500,000).

- (i) Worker's Compensation Coverage is acceptable on one of the forms below:

- **Form C-105.2** – Certificate of Workers' Compensation Insurance issued by private insurance carriers; **OR**
- **Form U-26.3** issued by the State Insurance Fund; **OR**
- **Form SI-124** – Certificate of Workers' Compensation Self-Insurance; **OR**
- **Form GSI-105.2** - Certificate of Participation in Workers' Compensation Group Self-Insurance; **OR**

- **CE-2006** – Certificate of Attestation of Exemption from NYS Workers’ Compensation and/or Disability Benefits Coverage.

(ii) Disability Benefits Coverage is acceptable on one of the forms below:

- **Form DB-120.1** - Certificate of Disability Benefits Insurance; **OR**
- **Form DB-155** - Certificate of Disability Benefits Self-Insurance; **OR**
- **CE-200** – Certificate of Attestation of Exemption from New York State Workers’ Compensation and/or Disability Benefits Coverage.

B. Automobile Liability Insurance including owned, non-owned and hired vehicle liability insurance, for combined limits of liability of One Million Dollars (\$1,000,000) per occurrence.

C. Professional Errors and Omissions Liability - Errors and Omissions (or Professional Liability) insurance with limits of not less than One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) in the general aggregate.

Certificates of Insurance, presented on Acord form 25, accompanied with additional insured endorsement CG2010 (1001) and CG2037 (0704), if determined it is necessary, or, if acceptable to the HTFC, their equivalent, shall be delivered to HTFC, prior to beginning the work, evidencing the coverage required hereunder and showing all such coverages as noted above being in force. All insurance policies provided by the Consultant’s Parties shall be maintained under terms and conditions reasonably satisfactory to HTFC, and Consultant’s Parties shall provide such other insurance coverage as HTFC may reasonably request from time to time. HTFC will not accept any exculpatory language such as “endeavor to” and “but failure to do shall impose no obligation or liability of any kind upon the insurer, its agents or representatives” on the Certificate of Insurance, i.e., the certificates shall meet the insurance requirements above.

8. Administrative Information

8.1 Questions and Answers

Any questions or requests for clarification regarding the RFB must be submitted via email to Lisa.Pagnozzi@nyshcr.org with a copy to Berniesha.Coleman@nyshcr.org citing the RFB page and section, no later than the date identified in the “*Calendar of Events and Milestones*” section of this RFB. The “Subject” line of the email should indicate “2019 - HCV Specialist Training RFB.”

Questions will not be accepted orally and any question received after the deadline will not be answered. The list of questions/requests for clarifications and the official HTFC responses will be emailed in a timely manner to all potential Bidders or posted to HTFC’s website at <https://hcr.ny.gov/procurement-opportunities>.

Bidders should note that all clarifications and exceptions are to be resolved prior to submission of the bids.

8.2 Awarded Contract

The term of the contract will be for a one (1) year period, with a one (1) year renewal option to be exercised at the discretion of HTFC. In addition, the HTFC, at its discretion, may exercise its option to revise any provision of the contract, including the scope of services, compensation, term, etc., on an as needed basis, with the mutual written consent of the contracting parties.

HTFC reserves the right to negotiate with the selected Bidder to provide additional trainings during the contract period as necessary. Any Bidder awarded a contract will be required to execute a Consultant Services Agreement with HTFC that incorporates HTFC's [Standard Clauses for Contracts](#), hyperlinked herein as Appendix I, [MWBE Participation Requirements and Procedures for Contracts](#), hyperlinked herein as Appendix II and [HUD's Section 8 General Provisions for Contracts](#), hyperlinked herein as Appendix III.

9. RFB Submission Requirements

Interested Bidders must submit bids to HTFC by e-mail to Nyhomes.Proposal@nysher.org, in PDF file format. The "Subject" line of the e-mail should state, "2019 - HCV Specialist Training RFB."

Bids must be received by HTFC no later than the date for Deadline of Submission of RFB Bids indicated in the Calendar of Events and Milestones section of this RFB. Bidders are responsible for ensuring actual receipt of the bid response by HTFC by the time designated above.

10. Contents of RFB Submissions

Interested Bidders should submit a bid which includes the following information:

- A. Application Cover Sheet (as outlined on Page 3 through 5 of this RFB);
- B. Cover Letter which includes the Bidder's name, address, telephone number, fax number, email address and web site address, if applicable; the name(s) of the key staff who will provide services to HTFC; a statement by the Bidder indicating its willingness to engage in MWBE and SDVOB partnering, subcontracting, or mentoring arrangements with MWBE and SDVOB firms selected by the Bidder; and a written certification that the information contained in the RFB response is true and accurate and the person signing the cover letter is authorized to submit the RFB response on behalf of the Bidder;
- C. Bid Submission which includes:
 - 1. Bidder's statement of qualifications and experience relating to the Scope of Services and Deliverables defined herein;
 - 2. Bidder's engagements or contracts of similar size and scope compared to the Scope and Deliverables cited in Section 6 of this RFB;

3. Preferred qualifications, experience and skills, if any;
4. A detailed Workplan for the proposed engagement which targets how the deliverables under the proposed engagement will be met;
5. Resume(s) of key personnel providing Consultant Services under the engagement;
6. A completed Cost Proposal Form as shown in Exhibit B. All costs provided in Exhibit B shall include the following:

The Consultant will be paid strictly on a “per training session” basis, in monthly arrears. The Consultant must establish a single fee for each training session and the Regional Meeting. The fee for each type of training session must be inclusive of all direct and indirect costs associated with each training which includes:

- i. Staffing costs including fringe benefits;
- ii. All training equipment, software, training materials and aids used to facilitate each training session;
- iii. Any other equipment and vehicles required;
- iv. All travel costs within the five boroughs of New York City, including mileage, tolls, etc.;
- v. All required insurance;
- vi. Facility and overhead; and
- vii. Ongoing training.

If HTFC requests training at locations outside of NYC, the Consultant will have the opportunity to negotiate an additional fee related to travel; however, such costs must not exceed the Not to Exceed Amount indicated in Exhibit B and must be billed in accordance with the policies outlined in the [New York State Office of the State Comptroller Travel Manual](#), hyperlinked herein.

D. Administrative Forms listed in the Bid Submission Checklist, page 2 of this RFB;

E. Conflict of Interest Statement which discloses:

- 1) Any existing or contemplated relationship with any other person or entity, including relationships with any parent, subsidiary or affiliated entity, which would constitute an actual or potential conflict of interest or appearance of impropriety, relating to other clients/customers of the Bidder or former officers and employees of the HTFC and its HCR Affiliates, in connection with your rendering the services enumerated in this RFB;
- 2) If a conflict does or might exist, please describe how your firm would eliminate or prevent it; and

- 3) Indicate what procedures will be followed to detect, notify HTFC of, and resolve any such conflicts.

F. Disclosure of Commission Findings:

The Bidder must disclose whether its entity, or any of its members discussed in the above paragraph, has been the subject of any investigation or disciplinary action by the New York

State Joint Commission on Public Ethics or its predecessor State entities (collectively, the “**Commission**”), and if so, a brief description must be included indicating how any matter before the Commission was resolved or whether it remains unresolved.

11. Evaluation of RFB Submissions and Selection Process

Bid Submissions will undergo an evaluation process conducted by HTFC. HTFC will evaluate the Bid Submissions based upon the following criteria, not necessarily listed in the order of importance: All information submitted in response to this RFB, including:

- Relevant experience and general qualifications and experience of the key personnel proposed to be assigned to an HTFC engagement;
- Proposed fees and costs;
- Workplan for the proposed engagement; and
- Overall organization, completeness and quality of response, including cohesiveness and clarity of response.

The selected Bidder(s) will be notified via U.S. mail or electronic mail (e-mail). Bidder(s) who are not selected will be notified of HTFC’s determination via U.S. mail or e-mail.

COST PROPOSAL FORM

HTFC Housing Choice Voucher Training Consultant Services RFB

Training Session	Length of Training Session	Cost Per Each Training
6.1 Housing Specialist Training Certification	5 Days	\$ _____
6.2 Housing Choice Voucher Project Based Voucher Training Session (exam and certificate optional)	3 Days	\$ _____
6.3 Housing Choice Voucher Specialist Refresher Training Session	3 Days	\$ _____
6.4 Low Income Housing Tax Credits Training Session	2 Days	\$ _____
6.5 Section Eight Management Assessment Program (SEMAP) Training Session	1 Day	\$ _____
6.6 Housing Choice Voucher Program Regional Annual Meeting	Half Day	\$ _____
Not to Exceed Annual Amount for Estimated Travel Costs (outside of the 5 boroughs of New York City)		\$ _____

TOTAL \$ _____

