

## **Request for Proposals (RFP) for Delivery of Training and Technical Assistance Services for Housing Opportunity through Modernization Act Compliant Forms**

### **A. Background**

The Department of Housing and Urban Development (HUD) awarded FirstPic, Inc. (FirstPic) grants to provide direct training and technical assistance (T/TA) to public housing agencies (PHAs) and local units of government that administer HUD programs to improve capacity to administer the Housing Choice Voucher (HCV) and Public Housing (PH) Programs.

FirstPic is requesting proposals from qualified individuals or organizations for the purpose of providing Subject Matter Expertise to FirstPic on the Housing Opportunity through Modernization Act (HOTMA) compliance for the PH and HCV programs beginning in September 2024.

The HOTMA 102 and 104 Final Rule which became effective January 1, 2024, made substantial updates to how public housing agencies (PHAs) must calculate income and assets for HCV and public housing families. Some aspects of the Final Rule have the potential to significantly streamline program operations if implemented effectively.

As PHAs come into compliance with the Final Rule, technical assistance on streamlined ways of implementing program regulations is necessary to ensure effective implementation. In particular, PHAs need to update their initial eligibility packets, annual recertification packets, and interim recertification packets to address new program requirements.

These packets consist of a variety of forms, including questionnaires, verification forms, and other types of information participants must supply the PHA in order for the PHA to complete its determinations.

These packets and forms should be easily understandable for program participants, many of whom may have low literacy.

High-quality samples of these packets and forms are necessary to help PHAs implement the new HOTMA Final Rule and to assist program participants in understanding program requirements.

### **B. Scope of Work**

FirstPic, in partnership with the Public Policy Lab (PPL), is working to provide HOTMA-compliant sample eligibility and recertification packages for both the HCV and PH Programs. These sample packets will be published as templates for PHAs nationwide to use and modify. FirstPic is seeking support from qualified individuals to collaborate with our team and provide support as a subject expertise for this assignment. Specifically, the individual(s) will be asked to provide the following:

#### **Inputs and Materials**

- Samples of high-quality forms/documents used by PHAs to collect data from program applicants and participants. This should include 1-2 samples of all of the named documents listed in Appendix A.
- Summary of HOTMA requirements for each of the named documents. The summary should focus on the impact of HOTMA on tenant data collection requirements and/or the wording of questions contained in the named documents (Appendix A).
- Summary of major categories or types of PHAs by operational/regulatory classification (e.g., Safe Harbor, Moving to Work, approach to waiting list management, etc.). The purpose of this summary

is to help the team create templates that can be used in various operational/regulatory circumstances, so the emphasis should be on operational/regulatory differences that impact a PHA's tenant data collection materials (i.e. the documents listed in Appendix A) and/or a PHA's compliance with HOTMA requirements.

- Precedent examples of HUD voluntary guidance materials issued to PHAs to inform tenant data collection or similar operational practices.

### **Project Support Tasks**

- Participation in periodic collaborative design sessions led by PPL.
- Review of draft tools/materials for compliance with HOTMA requirements.
- Participation in meetings with FirstPic, PPL, and HUD to review draft deliverables.
- Periodic consultation with FirstPic and PPL to accurately apply HUD guidance after design-review meetings.
- Periodic consultation with FirstPic and PPL on operations and systems used by PHAs to transmit and report tenant data to HUD (e.g., the 50058), and any implications of HOTMA/HIP on such transmission/reporting systems or tools.

**Anticipated delivery of the final documents is Spring 2025.**

### **C. FirstPic Equity and Diversity Policies**

As an equal opportunity employer, we comply with Federal and State regulations as well as related State and local laws and regulations to protect the right to equal opportunity for all individuals. FirstPic recruits, hires, trains, and promotes all persons without regard to race, creed, color, religion, gender, national origin, age, marital status, sexual orientation, gender identity, political belief, physical or mental disability, medical condition, or other classifications protected by Federal, State, or local law.

### **D. Proposal Format and Required Documents**

Consultants/subcontractors must provide sufficient detail to facilitate the review of all factors included in the evaluation criteria, and must include the required items listed below. Failure to provide required items will result in the proposal being considered non-responsive. Proposals shall be emailed and received by the date, time, and at the place established below, to be considered.

FirstPic reserves the right to accept or reject all proposals. FirstPic is not responsible for any proposal that does not reach our offices prior to the submission deadline.

Questions regarding the proposal and requirements shall be received in written form only to [responses@firstpic.org](mailto:responses@firstpic.org). No phone calls accepted.

Applicants must submit responses by August 25, 2024.

Send proposals via email to FirstPic, Inc.: [responses@firstpic.org](mailto:responses@firstpic.org)

## E. Submission Requirements

**Previously qualified T/TA consultants and subcontractors only need to submit the Narrative and Cost Proposal (no need to submit cover letter, resumes, or past performance).**

**1. Cover Letter (Previously qualified T/TA consultants and subcontractors do not have to submit)**

A cover letter, which must include all necessary contact information (i.e., business mailing address, business phone number, business cell phone number, and business email address) for the consultant or subcontractor.

**2. Résumé (not to exceed three pages per person)**

A résumé for each individual who is being proposed to provide training and technical assistance.

**3. Past Performance (at least two examples, not to exceed three)**

Provide the following information for examples of past performance with references.

- a. Subcontractor/Consultant Name
- b. Entity Assisted
- c. Dates of Period of Performance
- d. Consultant or subcontractor Role/Position Held
- e. Service Provided
- f. Activities Undertaken (to provide service)
- g. Results/Outcome: (examples increased productivity, improved HCV utilization, new funding sources, PHAS score improvement, findings corrected, or awards and commendations.
- h. Reference Contact Name, Phone, Email

**4. Narrative and Cost Proposal**

The applicant must provide the loaded hourly rates (no profit/fee) for each individual being proposed to provide T/TA and the number of hours being proposed for the scope of work.

Applicants must also submit a brief (no longer than 3 pages narrative) that describes:

- a. professional capacity to complete the work,
- b. plan for completing the work, and
- c. willingness to collaborate with FirstPic and PPL.

Applicants that have not already engaged with FirstPic must also submit the attached Community Compass Certification. The applicant must show the unburdened hourly rate as well as the fully loaded rate.

***Please note: No fee or profit may be paid to any T&TA consultant/subcontractor or contractor/consultant on an award under this RFP. Salaries are capped at the daily equivalent rate for a General Schedule 15, Step 10 federal employee (salary does not include fringe benefits). This cap applies to all persons involved (employees of applicant, subcontractors, consultants, etc.).***

### Community Compass Certification

Please enter all staff that may be assigned to work on Community Compass activities.

NAME	Base Rate/Hour	Fringe Rate	Total rate per hour (Base + Fringe)

(Please initial each statement below)

\_\_\_\_\_ I certify that the above rates reflect customary rates, including rates on non-government contracts or cooperative agreements; and that these rates are consistent with the best/lowest customary rates that have been offered to previous clients.

\_\_\_\_\_ I have provided evidence that the above rates reflect customary rates, including rates on non- government contracts or cooperative agreements; and that these rates are consistent with the best/lowest customary rates that have been offered to previous clients. (Evidence may include published GSA/MOBIS schedules or an invoice for similar work)

\_\_\_\_\_ I also understand that certify that no fee/profit is loaded into the rates above as this is specifically prohibited.

Certified by:

\_\_\_\_\_  
Print Name of Authorized Representative

\_\_\_\_\_  
Email address

\_\_\_\_\_  
Organization Name

\_\_\_\_\_  
Signature of Authorized Representative

\_\_\_\_\_  
Date

## Appendix A: List of Sample Documents:

- **Application for assistance:** Document design will be based on the sample PHA selecting the most streamlined policies available under program regulations (e.g., Safe Harbor). It should also be based on the PHA having a simplified waiting list preference for people experiencing homelessness.
- **Verification Forms:**
  - Waiting list preference
  - Employment
  - Child care expenses
  - Health and medical care expenses
  - Full-time student status
  - Child support
  - Assets, including Self-certification of assets
  - Regular contributions
  - Non-recurring Income
  - Declaration 214
  - Disability
  - Reasonable Accommodation Request
  - Live-in Aid Request
- **Sample Regular Reexamination Packet:**
  - Application for continued assistance: Completed by the family to provide PHA information necessary to complete reexamination. This application should be designed based on the sample PHA selecting the most streamlined policies available under program regulations (e.g., Safe Harbor, not applying asset limitation at reexamination).
  - Verification forms (repeat from eligibility packet)
- **Sample Hardship Request Forms:** (childcare, medical expenses)
- **Sample Informal Hearing Request or Grievance Hearing Request Form**
- **Sample Interim Reexamination Packet**
- **Sample Non-Interim Change Packet:**
  - Request to add or remove family member
- **Sample Termination Letters:** Due to over asset limit