



CONSULTING AGREEMENT

THIS CONSULTING AGREEMENT (the “Agreement”), made effective as of April 1, 2025 (the “Effective Date”), is entered into by the **Chicago Housing Authority**, an Illinois municipal corporation with its primary place of business at 60 East Van Buren Street, Chicago, Illinois 60605 (the “Client”), and **Orange Grove Consulting, LLC** a Massachusetts limited liability company with the primary place of business at 831 Beacon St, #131 Newton Centre, MA 02459 (the “Consultant” and collectively with the Client, the “Parties”).

WHEREAS, the Consultant has special expertise in consulting, creating and implementing programs for business professionals; and

WHEREAS, the Client desires to retain the services of the Consultant and the Consultant desires to perform certain services for the Client as a contractor of the Client.

NOW THEREFORE, in consideration of the mutual covenants and promises in the Agreement and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

1. Services and Staffing. The Consultant agrees to perform the services (“Services”) specified by the Client as described on the Project Appendix attached hereto and incorporated herein as Attachment A (the “Project Appendix”). Any additional Services shall be described in subsequent amendments of or additions to the Project Appendix, as agreed by the Parties in writing. In the event of a conflict between this Agreement and the Project Appendix, the terms of this Agreement shall control.
2. Principal Duties. During the Term, Consultant will at all times use commercially reasonable efforts to provide the Services to Client in a timely and professional manner consistent with industry standards. The Consultant, with input from the Client, will determine the manner and means by which the Services will be performed.
3. Term. This Agreement shall commence on the date hereof and shall continue until six (6) months after the Effective Date or the final program delivery, whichever is sooner, and as specified in the Project Appendix (the “Consultation Period”), unless earlier terminated in accordance with the provisions of Section 5.



4. Compensation.

(a) Services and Expenses. The Client shall pay to the Consultant the Consulting Fees according to the fee and payment schedule set forth in the Project Appendix. The Client shall also reimburse Consultant for reasonable out of pocket expenses provided that such expenses were approved by the Client, in advance in writing, and sufficient evidence required by the Client of such expenses is provided to the Client. Payment shall be made immediately upon receipt of Consultant's invoice.

(b) No Benefits. The Consultant shall not be entitled to any benefits, coverages or privileges, including, without limitation, social security, unemployment, medical or pension payments or stock options, made available to employees of the Client.

5. Termination.

(a) Either Party may terminate this Agreement for any or no reason upon 30 calendar days' prior written notice to the other Party

(b) Either Party may terminate this Agreement immediately at any time if the other Party materially breaches this Agreement, including but not limited to failure to make undisputed payments to the Consultant as set forth in the Project Appendix or Consultant's failure to timely provide any Services; provided, however, the nonbreaching Party first provides written notice of such breach to the breaching Party, and the breaching Party fails to cure such breach within ten (10) days after receipt of such notice.

- (i) Upon Consultant's receipt of the notice of termination from the Client, Consultant shall:
 - (1) immediately discontinue all Services affected (unless the notice directs otherwise); and
 - (2) deliver to the Client all information, reports, papers, and other materials accumulated or generated in performing the Agreement, whether completed or in process, and subject to Section 8 of this Agreement.
- (ii) If the termination is for the convenience of the Client, the Client shall be liable only for payment for Services performed to the satisfaction of Client, based on reasonable judgment, pursuant to the terms in Section 7 before the effective date of the termination.
- (iii) If the termination is due to the failure of the Consultant to fulfill its obligations under the Agreement, the Client may (x) require the Consultant to perform or deliver Services at Consultant's sole expense, in the manner and to the extent directed by the Client subject to the terms in Section 7, including any work described in the notice of termination; or (y) take over the work and perform the Services not completed by Consultant. The Client



shall be liable to the Consultant for reasonable costs incurred by the Consultant before the effective date of the termination for services satisfactorily performed by the Consultant based on Client's reasonable judgment, consistent with the terms of this Agreement.

(c) Intentionally Deleted.

(d) The rights and obligations of the Parties set forth in this Sections 7, 8, 9, 11 and 12, and any right or obligation of the Parties in this Agreement which, by its nature, should survive termination or expiration of this Agreement, will survive any such termination or expiration of this Agreement.

6. Responsibilities of the Parties. Collaboration will occur between Consultant and Client but each will have primary responsibility for the following specific areas of focus:

(a) Responsibilities of Consultant: With assistance from the Client, Consultant will design and manage the details of the engagement to meet all the goals indicated in the Project Appendix.

(b) Responsibilities of Client: Client will be responsible for communicating the details of the engagement as necessary, managing the participant logistics, providing a suitable venue for the meetings, and feedback on intermediate deliverables as reasonably requested and in a reasonable timeframe agreed upon by the Parties.

7. Representation and Warranty. The Consultant represents and warrants to the Client that Consultant shall use commercially reasonable efforts in the performance of Consultant's obligations under this Agreement and shall perform the Services in accordance with guidance provided by the Client. The Client shall provide information to Consultant as may be reasonably required in order to permit the Consultant to perform its obligations hereunder. The Consultant shall cooperate with the Client's personnel, shall not unreasonably interfere with the conduct of the Client's business and shall observe all rules, regulations and security requirements of the Client, including, concerning the safety of person and property and security of information provided by Client to the Consultant.



8. Inventions. (a) All training modules, slides, assessments, teacher notes, e-training, derivative works, computer programs, data, technology, designs, innovations, improvements and other related intellectual property (whether or not patentable and whether or not copyrightable) that has been previously developed by the Consultant before the Effective Date (all of the foregoing are referred to herein as the “Consultant Materials”), shall remain the property of the Consultant. Client grants Consultant a non-exclusive right to use Client intellectual property, including copyright, trademark and other proprietary rights in Consultant Materials during and following the term of this Agreement.

(b) The parties agree and understand that in connection with Consultant’s provision of services and deliverables under this Agreement, the Consultant is creating/refining a new “Resident Satisfaction Survey for Client. The Consultant shall have and retain exclusive ownership of all proprietary interest in and to the Survey, including but not limited to copyright; however, Consultant shall not be granted any ownership rights to any intellectual property owned by Client or its residents, including, but not limited to copyright, trademark, tradenames, patents and/or any personal identifiable information. Under the terms hereof, the Consultant shall administer the Survey for the Client, and any results, reports or other deliverables resulting from the administration of the Survey subject to paragraph 8(c) below. Client may not reproduce, reuse, distribute, license or administer the Survey in any way without the express written consent of Consultant, which shall not be unreasonably withheld.

(c) Notwithstanding the foregoing, pursuant to 24 CFR 85.36(i)(8), (9), the Client may be granted rights in and to Consultant’s patent rights, copyrights and rights in any discoveries, inventions or rights in any data arising or developed under the Agreement, including, but not limited to, reports, memoranda or letters concerning the research and reporting tasks of the Agreement.

9. Proprietary Information.

(a) The Consultant acknowledges that its relationship with the Client is one of high trust and confidence and that in the course of Consultant’s service to the Client the Consultant may have access to and contact with Proprietary Information of the Client. The Consultant agrees that Consultant will not, during the term of the Agreement or at any time thereafter, disclose to others, or use for Consultant’s benefit or the benefit of others, any Proprietary Information of the Client.



(b) “Proprietary Information” shall mean, by way of illustration and not limitation, all information (whether or not patentable and whether or not copyrightable) owned, possessed or used by the Client, including, without limitation, any invention, formula, vendor information, customer or client information, trade secret, process, research, report, technical data, know how, computer program, software, software documentation, design, technology, marketing or business plan, forecast, unpublished financial statement, budget, license, price, cost and employee list that is communicated to, learned of, developed or otherwise acquired by the Consultant under the terms of the Agreement.

(c) The Consultant’s obligations under this Section shall not apply to any information that (i) is or becomes known to the general public under circumstances involving no breach by Consultant, (ii) is disclosed to third parties by the Client without restriction on such third parties, or (iii) is approved for release by written authorization of the Board of Commissioners of the Client.

10. Independent Contractor Status. The Consultant shall perform all Services under this Agreement as an “independent contractor” and not as an employee or agent of the Client. The Consultant is not authorized to assume or create any obligation or responsibility, express or implied, on behalf of, or in the name of, the Client or to bind the Client in any manner. Except as otherwise provided in this Agreement, Consultant has the right and obligation to supervise, manage, contract, direct, procure, perform or cause to be performed all work to be performed by it pursuant to this Agreement, including the engagement of subcontractors with subject matter expertise. Consultant shall be solely responsible for the compensation of such subcontracted experts. Subject to Client’s prior written approval, which shall not be unreasonably withheld, Consultant may have the right to (i) identify Client as a customer of Consultant for purposes of promotion and marketing of Consultant’s services and (ii) include Client’s name and logo to identify Client as a customer of Consultant on its marketing materials (including Consultant’s website).

11. Intentionally Deleted.

12. Entire Agreement; Amendments; Interpretation. This Agreement constitutes the entire agreement between the Parties and supersedes all prior agreements and understandings, whether written or oral, relating to the subject matter of this Agreement. This Agreement may be amended or modified only by a written instrument executed by both the Client and the Consultant. This Agreement shall be construed, interpreted and enforced in accordance with the laws of the State of Illinois. This Agreement



shall be binding upon, and inure to the benefit of, both parties and their respective successors and assigns. This Agreement may be executed by electronic signature and may be executed in counterparts, each of which shall be deemed an original and which together shall constitute one agreement.

13. Compliance with Laws. The Consultant shall observe and comply with all applicable laws, ordinances, rules, regulation and executive orders of the federal, state and local government.

14. Force Majeure. Neither Party will be liable for any delay or failure to perform, to the extent that such delay or failure is caused by any act of God, domestic war, natural disaster, strike, lockout, labor dispute, work stoppage, fire, third-party criminal or terrorist act, pandemic, endemic or act of government, or any other event beyond its reasonable control.

15. Risk Management. Consultant agrees to comply with all of the Client's Insurance Requirements, attached hereto and incorporated herein, as Attachment B.

[SIGNATURES ON NEXT PAGE]



IN WITNESS WHEREOF, the Parties hereto have executed this Agreement as of the day and year first written above.

Chicago Housing Authority

Orange Grove Consulting, LLC

By: Sheila Johnson

By: Jodi Detjen

Name: Shelia Johnson

Name: Jodi Detjen

Title: Deputy Chief of Procurement

Title: Managing Partner

04/08/2025

04/04/2025

Date: _____

Date: _____

Approved as to Form and Legality
Chicago Housing Authority
Office of the General Counsel

Elizabeth Silas

By: Elizabeth Silas (Apr 8, 2025 12:09 CDT)

Elizabeth Silas
Interim Chief Legal Officer



ATTACHMENT A: PROJECT APPENDIX

The following Project Appendix is incorporated into and part of the Consulting Agreement herein (the “Agreement”) between the “Client” and the “Consultant”, as of the Effective Date. All other terms and conditions of the Agreement shall remain in full and effect.

Services:

RESIDENT SATISFACTION SURVEY

ACTIVITY	DESCRIPTION
Planning meeting	Timeline development and confirmation of process steps and Activities to be approved in writing by the Parties
Collect Data	Collection and review of any related contextual data, such as previous survey results, resident reports or other artifacts
Survey Input & Adjustment	Tailor survey; may involve subsequent meetings
Communication Plan	Provide suggested communication plan for survey and sample/draft communications across two rounds of revisions.
Resident Survey	Provide survey link for distribution to residents
Focus Groups (TBD; based on CHA decision and recommendations from OGC)	Provide suggestions for attendee groupings; provide draft communication language; provide 2 facilitators for each focus group; pull themes and integrate into analysis. Focus groups would occur in person. The survey would occur online. Up to 5 focus groups and one survey will be delivered. The exact number of focus groups will be finalized during planning.
Report Draft	Present draft report to main point of contact, with time for review and opportunity to address questions & select additional data cuts, which will be provided to the satisfaction of the Client with up to three revisions.
Report Presentation	Report presentation meeting with key stakeholders, with follow up discussion(s) of findings and next steps suggestions, which report shall be revised, if needed, to the satisfaction of the Client, up to three revisions.



Consulting Fees:

SERVICE/SPECIFICATION	Fee
Resident Satisfaction Survey	\$28,000
Option for Focus Groups (1 day, 2 consultants, 5 total focus groups)	\$10,000

Payment Schedule:

Upon Signature of the Agreement	\$10,000
After the time of survey launch	\$5,000
If focus groups are hosted – one week after focus groups	\$10,000
One week after draft report presentation	\$8,000
One week after stakeholder presentation	\$5,000



Cancellation: Any cancellation or termination of this Attachment A: Project Appendix is subject to Section 5 of the Agreement.



SCHEDULE III: EXPENSES

Travel and expenses are invoiced at cost.



ATTACHMENT B: INSURANCE REQUIREMENTS

Prior to the commencement of this Agreement, the Consultant shall procure and maintain at all times during the term of this Agreement insurance against claims for bodily injury or property damage which may arise from or in connection with Services performed under this Agreement, and from the negligent acts, omissions and errors of the Consultant, its officers, agents, representatives or employees. The insurance carriers used must be authorized to conduct business in the State of Illinois and shall have an A.M. Best rating of not less than A: VII.

A. Minimum Coverage and Limit Requirements

1. Commercial General Liability: General Liability Insurance on an occurrence basis with limits not less than \$1,000,000 per occurrence with an aggregate of not less than \$2,000,000 covering bodily injury and property damage. This coverage shall also include, but not be limited to, contractual liability, products and completed operations, personal and advertising injury.

2. Workers' Compensation and Employer's Liability: Coverage must be in accordance with the laws of the State of Illinois and include a waiver of subrogation in favor of Chicago Housing Authority.

- o Coverage A - Statutory Limits

- o Coverage B - Employers Liability - \$500,000 bodily injury or disease each accident;
each employee

3. Auto Liability: Required when any vehicles (owned, hired and/or non-owned) are used in connection with the Services to be performed, coverage limits of not less than \$1,000,000 per occurrence combined single limit for Bodily Injury and Property Damage.

4. Professional Liability: Coverage is required when Services are performed by licensed professionals and/or a scope of work involves performing any financial, auditing, consulting, design, engineering, surveying, testing, or other professional services. Professional Liability Insurance appropriate to the Consultant's profession shall provide coverage for the acts, errors, or omissions with a limit of not less than \$1,000,000 per claim or occurrence. When policies are renewed or replaced, the policy retroactive date must coincide with, or precede, the start of Services under the Agreement. A claims-made policy which is not renewed or replaced must have an extended reporting period of two (2) years following termination or expiration of Agreement.



B. Related Insurance Requirements

1. The Certificate of Insurance evidencing the minimum coverages required herein shall be in force on the Effective Date of the Agreement and continuously throughout the term of the Agreement. The required documentation must be received prior to the commencement of services under this Agreement.

2. The Parties understand and agree that the Chicago Housing Authority and others listed below shall be included as Additional Insureds on the Consultant's liability policies, with the exception of Professional Liability and Employer's Liability, and such insurance is primary to and the Consultant will not seek contribution from any insurance, deductibles, self-insured retentions and/or self-insured programs available to the Chicago Housing Authority.

Certificate Holder: Chicago Housing Authority
60 E. Van Buren St
Chicago, IL 60605

Additional Insureds: Collectively referred to as the "Additional Insureds" shall include the Chicago Housing Authority, Chicago Housing Administration, LLC, and/or other partnerships or limited liability companies as established by the Chicago Housing Authority, its respective commissioners, board members, officers, directors, agents, property management firms, employees, invitees and visitors.

Primary Coverage: For any claims related to this Agreement, the Consultant's insurance coverage shall be the primary policy. The Consultant expressly understands and agrees that any insurance or self-insurance programs maintained by the Chicago Housing Authority shall apply in excess of and shall not contribute with insurance provided by the Consultant.

3. Prior to the Chicago Housing Authority issuing the Notice to Proceed, the Consultant shall submit to the Chicago Housing Authority a Certificate of Insurance via PINS Advantage Certificate Tracking System, evidencing compliance with the insurance requirements set forth above. The Consultant will receive an email with instructions for the submission of its insurance. Copies of the endorsement(s) adding the "Chicago Housing Authority" to Consultant's policy as an additional insured are required upon request of the Chicago Housing Authority.

4. Updated Certificates of Insurance are required for policies which renew during the term of this Agreement or extensions thereof. Under no circumstances shall the Consultant allow any required coverage to lapse, cancel or non-renew throughout the Agreement term or extensions thereof.



5. At the Chicago Housing Authority's option, non-compliance with these insurance terms will result in: (1) all payments due the Consultant being withheld until the Consultant has complied with the insurance terms; (2) the Consultant being assessed Five Hundred Dollars (\$500.00) per day for every day of non-compliance; or (3) the Consultant immediately removed from the premises, if applicable, and the Agreement will be terminated.
6. The receipt of any insurance certificates does not constitute agreement by the Chicago Housing Authority that the insurance requirements in the Agreement have been fully met or that the insurance policies indicated on the certificate comply with all Agreement requirements. The insurance policies shall provide for thirty (30) days prior written notice to be given to the Chicago Housing Authority in the event coverage is substantially changed, canceled or non-renewed.
7. The Chicago Housing Authority in no way warrants that the minimum limits contained herein are sufficient to protect the Chicago Housing Authority from liabilities that might arise out of the performance of the Services under this Agreement by the Consultant or its subcontractors. The Consultant shall assess its own risks, and if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages. The Consultant is not relieved of any liability or other obligations assumed or pursuant to the Agreement by reason of its failure to obtain or maintain sufficient insurance.
8. The Consultant shall require all subcontractors to carry the required insurance and adhere to the same requirements and conditions as outlined above.
9. The Consultant expressly understands and agrees that any insurance or self-insurance programs maintained by the CHA shall apply in excess of and will not contribute with insurance provided by the Consultant and/or any of its subcontractors.



EXHIBIT A - COVER PAGE
RFQ 2025 CHA Survey on Resident Satisfaction

Tamika Carson
Director of Procurement
Procurement & Contracts
Chicago Housing Authority
60 E. Van Buren
Chicago, IL 60605

Hello Ms. Carson,

It is our understanding that the Chicago Housing Authority is seeking an outside partner to conduct a resident satisfaction survey to capture and gauge resident feedback on the overall satisfaction of residents.

If Orange Grove Consulting is selected as the partner for this initiative, key staff who would complete the major tasks of this engagement include Dr. Kelly Watson, Managing Partner, serving as lead consultant, Dolores Parsons, Project Coordinator, serving as administrative support for the survey, and myself, Keely Denenberg, SVP of Client Solutions, serving as consultant and project manager. Jodi Detjen, Managing Partner, would serve as an advising consultant. As such, I am the primary contact person for this proposal, with my contact information listed below my signature.

At the current time, our existing project workload for spring and early summer would allow us to take on this project, as we are able to handle up to four assessment/consulting engagements at any given time. We have one engagement underway that will be completed by April, leaving us with the capacity to take on up to three more consulting projects in the near future.

We are pleased to present this proposal for your consideration and hope we have the opportunity to interview during the next phase of your vendor review. Please note that sections containing proprietary/trade secrets, protected under exemption number 4 of the Freedom of Information Act, are noted at the start and the end, and a redacted copy has been included with this full copy.

Thank you for your consideration of our services. We look forward to hearing more.

Best,

Keely Denenberg, SVP Client Solutions
Orange Grove Consulting
keelyd@orangegroveconsulting.com

312-804-9094
Mailing Address: 831 Beacon Street, Suite 131
Newtown Centre, MA 02459



EXHIBIT A – APPROACH & WORK PLAN

RFQ 2025 CHA Survey on Resident Satisfaction

Orange Grove Consulting (OGC) is a women-owned and managed talent management & specialty leadership development consulting company. We specialize in enabling organizations to create more innovative, productive, and competitive workplaces by leveraging and engaging all of their talent. OGC is a certified Women Business Enterprise by both the [Supplier Clearinghouse](#) and the Massachusetts Supplier Diversity Office, as well as verified by the state of Massachusetts as a Small Business. Our work is grounded in research and experience, and we have been delivering quality programs & consulting engagements since 2013. Our curriculum & methodology is based on existing research as well as OGC's original research, [published books](#), and industry [thought leadership](#). We provide strategy, assessment & measurement, training, and change management/implementation solutions to assist a wide range of clients to operationalize engagement, belonging and leadership at their organizations.

Our programs, training courses and consulting solutions are tailored for the specific needs of our clients. Our proprietary strategy, assessment & measurement approach is research-based and operational. We assess current state, identify specific goals, and consistently measure progress for organizations serious about their talent management efforts. This directly leads to a positive operational impact. We use a collaborative approach to developing our leadership programs, creating custom workshops and training programs to help improve workplace skills.

Our diverse team & network of consultants have years of operational, training, and change management experience. We have worked with a range of clients through the years, including large Fortune-500 companies, associations, small consulting and engineering firms, mid-sized manufacturing companies, holding companies, technology & software start-ups, as well as government & government-funded and nonprofit organizations.

ORANGE GROVE CONSULTING FRAMEWORK & APPROACH

Orange Grove Consulting designs solutions, including assessments and training, within a research-based framework, which we use to help organizations create more engaged workplaces. This framework (shown in Figure 1) is described in a book on how to create inclusive workplaces that our Managing Partners have written; published 2021¹.

¹ https://www.amazon.com/Next-Smart-Step-Stereotypes-Organization-ebook/dp/B084M5Y6RX/ref=tmm_kin_swatch_0?encoding=UTF8&qid=&sr=

Figure 1 – Research-based Framework



The three elements of our framework include:

1. **Open mindsets:** Make the invisible assumptions about others visible so that people can see the challenges from different perspectives, enabling them to be open to change.
2. **Provide skills:** The OGC philosophy is that leadership and inclusion are teachable skills. People have not historically been taught these skills so they just need to be given the capabilities so they know what to do and the space to learn, make mistakes and develop expertise.
3. **Improve processes and environment:** Modify processes to create a learning, safe space, and adapt clearly articulated talent management practices, making it easier to create engagement and belonging.

PROJECT APPROACH & WORK PLAN

Understanding existing culture, including strengths and weaknesses, allows leadership the opportunity to create strategies to adjust areas which do not align with the organizational values, mission and goals. Leaders often are not offered direct feedback on their effectiveness and a true understanding of culture without enlisting the assistance of an outside perspective. An independent organization is often necessary to uncover the areas of opportunity and solicit honest feedback from employees. This 3rd-party perspective provides leadership with the data necessary to craft effective strategies that help strengthen engagement, belonging, culture, and ultimately impact organizational effectiveness.

RESIDENT SURVEY

Our researched-based surveys and assessment tools help leaders understand their customers, and in CHA's case, their residents, viewpoints and perspectives. Through our analysis of survey results, we highlight areas of strengths and opportunities for improvement that are specific and actionable.

Value to Organization:

- Baseline assessment to enable measurement of progress

- Recommendations are non-theoretical and specific in scope for practical application
- Third party gap analysis brings objectivity and industry expertise, as well as guidance to managing new information

Value to Residents:

- Survey participation increases engagement of residents
- Understanding the organization's commitment to residents
- Demonstration of direct actions resulting from their survey participation

PROPRIETARY/TRADE SECRET PROTECTED SECTION START

Assessment Approach

We begin with a survey. **Unlike most surveys, we analyze aggregate data, as well as look at the differences in answers between groups.** This highlights where there could be a difference in perception and hidden opportunities for increasing satisfaction for different types of residents within different types of properties. We design survey questions validated through academic research and with tested scales. Using data analytics methodology, we analyze survey results to identify statistically relevant differences among groups of residents to show trends and areas to target. Finally, we use a statistical regression model to determine which areas to focus on for the most impact.

Confidentiality & Anonymity

Using an outside consultant to gather feedback is a best practice, as most respondents are more comfortable sharing their feedback through a 3rd party, where confidentiality and anonymity are offered. We promise confidentiality and anonymity to respondents, and while we do not ask for survey respondents' names, we do ask for information that could be used to identify a respondent. We take our responsibility seriously, which means we will not report data that may reveal the resident's identity and we do not share raw data. The only exception would be related to issues of safety. Qualitative comments are anonymized, and if disaggregated data would potentially indicate identity, we will aggregate the data or else not share it.

Deliverables

We present an in-depth report on the results and our analysis. Through our years of conducting assessments, we have found there are a range of styles and not everyone is interested in the same level of detail. For this reason, the report is organized to begin with an executive summary of the survey & findings, followed by key challenges and associated recommendations. For those interested in a deeper dive into the data and analytics, the remainder of the report has multiple pages of detail for quantitatively-oriented readers. The report includes results segmented by various categories, incorporating both the data cuts requested prior to the project's initiation and any additional requests made after the draft report is shared. This ensures that all relevant data visualizations and breakdowns are included in the final report.

PROPRIETARY/TRADE SECRET PROTECTED SECTION END

Assessment Process

We begin with a planning meeting with key stakeholders to understand goals & agree on timing and steps. We discuss the communication plan, giving special attention to how the survey should be presented to encourage maximum participation. We then create and review the survey questions and make appropriate adjustments necessary for each specific audience group, while maintaining consistency in order to present aggregated results as part of the deliverable. Once the survey has launched, we provide regular updates on participation and suggestions for additional communication promoting the survey. Based on the initial response rates of different audience groups, we may host select focus groups to ensure we are receiving everyone's perspectives. After the survey closes, we analyze the results of the survey (and focus groups, if held) and create a report with associated relevant recommendations based on the results. If desired, we offer a draft report for review by our main points of contact. We then present the findings and analysis to key stakeholders, with the option for a second stakeholder presentation if requested.

Please note the recommendation of focus groups, along with which groups to invite to participate in focus groups, would be based on a collaborative discussion with CHA stakeholders after initial analysis of the responses received through the surveys from each audience group. If held, all focus groups would be hosted near the close of the survey in order for OGC to make recommendations on which groups to invite.

Resident Communication Plan

After working with a range of organizations, we have compiled a set of best practices and recommendations, along with draft communications, that we provide to our clients. Through a discovery meeting, we ask about communications used in prior initiatives, suggesting a range of channels to help build a comprehensive plan tailored to the practices normalized within your organization.

Specifically for this initiative, we would make recommendations regarding paper survey options based on discussions with stakeholders about the ability of some residents to reasonably access a digital survey. One potential option to be discussed is to offer a paper survey upon specific request, which would provide accessibility without an undue burden of offering a paper survey as a default. If paper surveys were to be offered, OGC would handle the data entry of the paper survey and CHA would be responsible for disbursement and expense of the survey with a stamped & pre-addressed envelope.

After survey launch, OGC provides regular updates on participation rates, typically twice a week or as otherwise requested by our client. We then suggest additional communications based on the response rates to support the best possible response outcome. Once the survey has closed, results are analyzed and findings presented to leadership, we offer an optional high-level overview document which can be shared with residents or the public if appropriate.

Survey Design & Client Input

OGC designs surveys with questions based on validated research. Using the areas that CHA is interested in understanding (as listed in the scope of work, as well as discussions with key stakeholders in planning meetings), survey questions would be chosen strategically in order to provide us with

information to make impactful recommendations based on our statistical regression analysis model. As part of the pre-survey process, we would provide CHA with a preview link to the draft survey for review. While we utilize research to design our surveys, we would tailor aspects of the survey to CHA's needs and the specific audience being surveyed. After CHA has had an opportunity to review the preview, we meet to discuss the survey and seek the following input:

PROPRIETARY/TRADE SECRET PROTECTED SECTION START

- Survey questions – we would start with a research-based survey, working closely with our key contacts to adjust and/or craft additional questions that provide insights and analysis that will inform decisions.
- Terminology – each organization has language norms and cultural terms, and we seek our client's input to integrate existing organizational terminology that resonates with residents and are used on a regular basis in communications.
- Introduction & section headings – the survey introduction gives an overview of the initiative, describes the confidentiality and anonymity offered through OGC. Section headings describe why the questions are included and/or the section purpose. All of this can be edited as appropriate for residents.
- Identity questions – because we are interested in presenting disaggregated results based on categories, we would work to select key demographic questions to ask at the end of the survey.

Please note that we envision creating one resident survey, with a set of universal questions followed by a separate set of questions tailored for the specific audience groups indicated by CHA. Each audience group would have a unique survey link/QR code, however many of the survey questions will be identical. Without a set of universal survey questions, results will not be comparable across the various audience groups.

If requested for accessibility purposes, surveys can be offered in additional languages, with all translation service expenses billed at cost.

PROPRIETARY/TRADE SECRET PROTECTED SECTION END

Survey & Focus Group Framework & Methodology

OGC is a research-based organization. Our survey and subsequent analysis are research-based in structure and methodology as follows:

PROPRIETARY/TRADE SECRET PROTECTED SECTION START

1. Survey: the survey utilizes a mixed methods research approach combining quantitative (based on validated scales) and qualitative (open-ended questions) thematic analysis. Most questions presented in the survey will be validated through existing academic research, while some questions may not be research-validated due to select customization requested by CHA.
2. Data analytics: we assess quantitative survey results through an R-based software to identify statistically relevant findings. We differentiate between statistical findings and subjective findings, to derive insights and detect patterns in existing data.

3. Qualitative analysis: survey comments are individually analyzed using a qualitative thematic research approach. The themes are incorporated into the analysis and recommendations.
4. (Optional) Focus groups: hearing first-hand the personal stories of a sampling of resident experiences at the organization allows OGC consultants to understand resident perspectives at a more holistic level and/or supplement a lack of survey responses from an audience group. Focus groups are hosted by one or more OGC consultant/s, and the information shared is considered confidential and only presented when anonymity can be provided.

Most surveys focus on the survey presentation itself. OGC's approach is different. This type of work yields changes in process and behavior. Therefore, we apply Kotter's change management framework to our approach. OGC team members are experts in change management, and as such change management theory is embedded in our analysis process and recommendations. Our approach focuses on making substantive changes that positively affect results. Based on change management research we focus on five areas, required for successful completion of change: culture, people, processes, performance, and leadership. We embed these areas into our recommendations for next steps.

PROPRIETARY/TRADE SECRET PROTECTED SECTION END

PROJECT ACTIVITIES AND TIMEFRAME

Our proposed activities, deliverables, and timeframe are presented in Figure 2 below.

Figure 2 – Project Activities & Timeframe

Project Activities & Timeframe - Resident Survey		
Activity	Deliverable/Outcome	Timeframe
Agreement Execution	Signed agreement	End of February 2025
Planning	Outline dates for all meetings/deliverables	Early March 2025
Survey Input	Review & tailoring of survey	Mid-March 2025
Communication Plan	Creation of communication plan for surveys	Mid-March 2025
Survey Open	Launch survey	End of March/Early April 2025
(Option for) Focus Groups	Host focus groups onsite	End of April 2025
Analysis	Inclusion analysis by OGC Team	End of April through early May 2025
Assessment Draft	Assessment draft report	May 2025
Assessment Finalized	Assessment report (final draft) & executive summary; stakeholder presentation	May 2025

Resident Communication	Optional communication provided	May 2025
Engagement Debrief	Provide feedback and suggested next steps	June 2025

ORANGE GROVE STRUCTURE & TEAM MEMBERS

OGC is led by two Managing Partners. The Clients Solutions lead assigned as the main point of contact maintains a direct line of communication with the client, staying in close communication through regular client check-ins.

RELEVANT TEAM MEMBERS (SEE APPENDIX FOR BIOS)

Keely Denenberg, Senior VP- Client Solutions at Orange Grove Consulting- [Bio Here](#)

Dr. Jodi Detjen, Managing Partner at Orange Grove Consulting- [Bio Here](#)

Dolores Parsons, Program Coordinator at Orange Grove Consulting- [Bio Here](#)

Dr. Kelly Watson, Managing Partner at Orange Grove Consulting- [Bio Here](#)

REFERENCES FOR RECENT & RELEVANT PROJECTS

PROPRIETARY/TRADE SECRET PROTECTED SECTION START

- Dana Finizio – Director of HR, North Hill, 781-433-6205, dfinizio@northhill.org
 - Project time frame – 2023 and 2024; no uncompleted work
- Margo Armstrong – Chief HR Officer & Senior Vice President, Tighe & Bond, 413-875-1645, MAArmstrong@tighebond.com
 - Project time frame – 2023 and 2024; no uncompleted work
- Kim Pratt – VP/CHRO, Brookhaven at Lexington, 781-372-0276, 1010 Waltham Street, Suite 600, Lexington, MA 02421, kpratt@brookhavenatlexington.org
 - Project time frame – 2023 and early 2024; no uncompleted work
- Sarah Rasmussen – Project Specialist, Westside Regional Center, 310-258-4037, 5901 Green Valley Circle, Suite 320, Culver City, CA 90230, sarahr@westsideRC.org
 - Project time frame – 2023, 2024 and 2025; have completed 4 projects with WRC and have recently engaged on a new project

PROPRIETARY/TRADE SECRET PROTECTED SECTION END



ADDENDUM NUMBER 1

February 4, 2025
Request for Quotes (RFQ)
Survey on Resident Satisfaction
Due Date: Friday, February 07, 2024, at 11:00 A.M. CST
Chicago Housing Authority
Department of Procurement and Contracts
60 East Van Buren, 8th Floor
Chicago, IL 60605

Receipt of this Addendum is to be acknowledged by the Contractor by signing, dating and submitting with the Proposal. Failure to do so may render the Proposal non-responsive.

The following revisions, clarifications, additions and/or deletions are included in this Addendum to Request For Quote-CHA Survey on Resident Satisfaction and are to be fully incorporated into Respondent's Response therein.

Respondent acknowledges receipt of Addendum: Keely Denenberg 2-6-25
Respondent's Signature Date

Item Number 1: QUESTION AND ANSWERS

1. Is this the first time a resident satisfaction survey will have been conducted? If no, what percentage of residents were surveyed in the past and what was the response rate? If it was conducted previously, what was done with the results and were they reported to residents?

Answer: *This is the first comprehensive survey. Specific programs have completed surveys about services in the past which we can share with the selected vendor.*

2. Does the CHA have a size in mind related to representative samples, in 2.1 "the surveys must be developed and distributed to a target a representative sample..."? I realize it says the chosen provider would work with CHA to determine this, but sometimes there is still a range in mind.

Answer: *For each housing type we are hoping for a confidence level of 95% with a margin of error +/- 5% but really want to talk that through with the selected vendor.*



3. Will there be a need for presenting the results in a meeting, (as opposed to just the written report) and if so, how many times?

Answer: There may be a need to have 1-2 virtual meetings with agency representatives, in addition to a written report.

4. Is there a target budget for this work?

Answer: There is no target budget for this work however we are looking for the most competitive pricing for this work.

**** END OF ADDENDUM NO. 1****

Chicago Housing Authority

Tamika Carson

Tamika Carson
Procurement Director

FEE PROPOSAL FORM

RFQ: CHA 2025 Resident Survey

Unit No.	Specification/Service Description	Unit of Measure	Total Bid Price*
1	Administering an evaluation tool to conduct resident survey	Fixed Fee	\$28,000
	Term: 6 months		
	*Plus expenses for paper surveys and/or language translation services billed at cost		

Unit No.	Specification/Service Description	Unit of Measure	Total Bid Price*
1	Option for onsite focus groups, 2 consultants, 1 day for 5 total focus groups	Fixed Fee	\$10,000
	Term: 6 months		
	*Plus expenses for travel & hosting space billed at cost		

* All expenses billed at cost and not included in total bid price

Keely Denenberg

Signature of Authorized Company Representative

Keely Denenberg

Printed Name of Authorized Representative

Orange Grove Consulting

Name of Company