



**CHICAGO HOUSING AUTHORITY ("CHA")
REQUEST FOR PROPOSAL ("RFP") EVENT NO. 3298 (2025)
for
Insurance Brokerage & Consulting Services**

**Required for use by
Risk Management**

ISSUED ON: Tuesday, August 19, 2025
ISSUED BY: DEPARTMENT OF PROCUREMENT AND CONTRACTS

PROPOSALS DEADLINE:
Thursday, September 11, 2025 at 11:00 A.M., CT

Proposals may be submitted early but must be received electronically no later than the date and time listed in the solicitation.

PROPOSALS WILL NOT BE ACCEPTED AFTER THE DUE DATE AND TIME

Respondent Name: _____

Contact Name: _____

Contact Telephone: _____

Contact Email: _____

This selection process is unique to the Scope of Work described herein and notwithstanding any other proposal, qualification or bid requests provided by the Chicago Housing Authority. Proposers must comply with the requirements as defined in this RFP.

Angela Hurlock
Interim Chief Executive Officer

www.thecha.org

Sheila Johnson
Deputy Chief Procurement

Table of Contents

ARTICLE I	INTRODUCTION.....	4
ARTICLE II	INTENT AND PURPOSE.....	4
ARTICLE III	STATEMENT OF WORK/SCOPE OF SERVICES	4
ARTICLE IV	GENERAL INSTRUCTIONS	7
ARTICLE V	SUBMITTAL REQUIREMENTS.....	11
ARTICLE VI	INSURANCE REQUIREMENTS.....	17
ARTICLE VII	EVALUATION PROCESS.....	19
ARTICLE VIII	CONTRACT GOALS	21
ARTICLE IX	STANDARD PROFESSIONAL SERVICES AGREEMENT	25
ARTICLE X	EXECUTIVE SUMMARY FORM	26

ATTACHMENT A – FEE PROPOSAL FORM(S)
ATTACHMENT B – INTENT TO BID/SUBMIT LETTER
ATTACHMENT C – VENDOR SUBMISSION CHECKLIST
ATTACHMENT D – STANDARD PROFESSIONAL SERVICES AGREEMENT
ATTACHMENT E – REFERENCE QUESTIONNAIRE
ATTACHMENT F – UTILIZATION PLAN

KEY INFORMATION

1. **RESPONDENT CONTACT WITH CHA:** The Procurement Specialist identified below is the *sole point of contact* regarding this RFP from the date of issuance until selection of the successful proposer(s).

Robert Thompson, Procurement Specialist

Chicago Housing Authority
Department of Procurement and Contracts
60 East Van Buren Street, 8th Floor
Chicago, Illinois 60605
Phone: (312) 913-7032
E-mail: rthompson@thecha.org

Responses shall be submitted via the Supplier Portal at <https://supplier.thecha.org> no later than **Thursday, September 11, 2025 by 11:00 AM CST**.

The Proposer shall be responsible for electronic submission by the due date and time. Late proposals will not be accepted.

An in-person pre-proposal conference is scheduled for **Tuesday, August 26, 2025, at 11:00 AM CST** to discuss the scope of services and the CHA contract requirements. The meeting address is 60 E. Van Buren Conference Rooms 736B-C. In order to participate onsite, you will need to **RSVP by Monday, August 25, 2025 at 4:00 p.m., CST** with Robert Thompson via email at rthompson@thecha.org. Please submit your Company Name, Your Name, and email address confirming reservation. To view the pre-proposal meeting online visit Microsoft Teams <https://msteams.link/QBKQ> Meeting ID: 221 461 455 850 0 Passcode: Ct9kp2wJ

The Letter of Intent to Submit a Proposal, Attachment B, is due **Tuesday, September 09, 2025, at 11:00 AM CST**. The Letter of Intent to Submit a Proposal, Attachment B must be submitted via the Supplier Portal at <https://supplier.thecha.org>.

If you do not intend to submit a proposal in response to this RFP, please submit via the Supplier Portal at <https://supplier.thecha.org>, a brief explanation in order to continue to receive future bid/RFP notices.

Questions regarding clarification or verification of these specifications and CHA contract requirements must be submitted via the Supplier Portal at <https://supplier.thecha.org>, no later than **Thursday, August 28, 2025, by 11:00 AM CST**.

Electronic Submission: CHA requires Respondents to submit an electronic proposal for the above-described Event. Respondent shall upload all documents via the CHA Supplier Portal at: <https://supplier.thecha.org>. Electronic proposal submission requires only one (1) copy. Each submittal section of the electronic proposal shall be labeled and separated into a different file as described in "ARTICLE V Submittal Requirements."

Note: There is no maximum file capacity size when uploading attachments in the Supplier Portal. If you receive an error message that states the "Maximum size is: 50" while uploading an attachment in the Supplier Portal, that error message is referring to the file naming size. The name of your file cannot be more than 50 characters. For questions or assistance with the Supplier Portal, please contact Mauricio Beltran, Senior Procurement Specialist, at 312-786-3391, mbeltran@thecha.org. **Respondent shall bear all costs of responding to this solicitation.**

ARTICLE I INTRODUCTION

CHA is the third largest public housing authority in the nation and the largest single owner of rental housing in Chicago. Through its public housing and voucher programs, CHA serves 135,000 people in over 65,000 households across all 77 of Chicago's community areas. CHA's mission is to create and sustain strong communities where seniors thrive and everyone can unlock their economic power, ensuring that every neighborhood in Chicago has quality affordable housing and everyone feels welcome.

In its procurement of its goods and services, CHA seeks relationships with vendors who share our values for inclusive and equitable contracting opportunities. CHA strives to be fair, transparent, and practical, and works to optimize the use of public funds through purchasing decisions. For more information, visit www.thecha.org.

ARTICLE II INTENT AND PURPOSE

The Chicago Housing Authority (CHA) is requesting proposals for comprehensive brokerage and consulting services. The contract for these professional services is expected to commence on December 1, 2025.

Services will include the competitive marketing, placement, and servicing of CHA's insurance portfolio, which encompasses the general program, an Owner-Controlled Insurance Program known as the Property Managers' Insurance Program (PMIP), and other necessary insurance placements. Current coverage includes Commercial Property, Auto, General and Excess Liability, Employment Practices and Public Officials Liability, Employed Lawyers Errors & Omissions, Crime, Employee Benefits Liability, Fiduciary, and Environmental Insurance.

CHA aims to ensure competitive pricing and quality service while complying with Housing and Urban Development (HUD) procurement regulations and internal standards. Proposed fees must exclude commissions, and respondents should clearly outline their fee structure by program. CHA plans to award a firm, fixed-rate contract for an initial two-year term, with the possibility of annual extensions for up to three additional one-year periods. CHA reserves the right to select one or more respondents through this solicitation.

The services will be awarded only to qualified insurance brokerage firms. No award will be made to a respondent that is listed as ineligible to receive awards from CHA or the Federal Government, as provided periodically by HUD.

This RFP is intended to secure professional services for brokerage support, not to select insurance carriers.

ARTICLE III STATEMENT OF WORK/SCOPE OF SERVICES

SCOPE

Services shall cover insurance programs for CHA's central office and operational exposures associated with traditional Public Housing, Rental Assistance Demonstration (RAD) and mixed-income properties. A dedicated account team with specialized coverage expertise is required.

All deliverables are to be coordinated with CHA's Risk Management. The selected firm will be responsible for the following:

1. Coverage analysis and recommendations for program improvements, including commercial and alternative risk transfer options
2. Competitive marketing, negotiation, and placement of insurance
3. Quarterly reporting and annual stewardship reporting
4. Coordination of annual/bi-annual claim review with Third Party Administrator (TPA)
5. Assistance with claims strategy and carrier interface
6. Maintenance of accurate and timely policy documentation
7. Risk advisory and strategic planning services

STATEMENT AND DELIVERABLES

The Selected Respondent is responsible for providing the following services to CHA:

1. Insurance Placement Services

As the Broker of Record, represent the CHA in the renewal process of all standard forms of business-related insurance which include, but are not limited to, the following coverages:

- Auto Liability
- Builders Risk
- Cyber Liability
- Employed Lawyers
- Employee Benefits Liability
- Employment Practices Liability
- Environmental Liability
- Excess Liability
- Fiduciary Liability
- General Liability
- Property, Boiler & Machinery
- Public Officials Errors and Omissions Liability
- Sexual Abuse & Molestation Liability

2. Program Analysis

Conduct an analysis of the current insurance programs and provide recommendations for modifications, such as alternative risk transfer programs, to the impact and feasibility of coverage design changes. The analysis must include the cost impact/savings based on historical premium history and analysis of current insurance market conditions. All recommendations will be presented to CHA's Risk Management before solicitations are made to the marketplace to ensure that proposed coverages, exposures and retentions are appropriate for the CHA and its properties.

3. Renewal process preparation

- a) Present a renewal action plan that meets timelines for CHA's Executive Office and Board of Commissioners' (BOC) board item review meetings. The plan is to include benchmarking data costing, limits, conditions, claim frequency and severity, as well as the financial strength of the insurers.

- b) Collect all required exposure information in conjunction with CHA Risk Management for underwriting purposes four (4) months prior to the renewal date of each insurance program.
- c) Provide analyses of quarterly loss runs from TPA and carriers.

4. Marketing phase of the renewal process

- a) Provide a forecast of market conditions, six months prior to each program renewal.
- b) The Selected Respondent shall solicit and procure insurance coverage for the CHA in compliance with all applicable federal guidelines, especially HUD's "Common Rule on Grantee Procurement" at 24. C.F.R. 85.36 et. seq. To ensure adequate competition, a minimum of three (3) bids are required for each line of insurance coverage and submit vendor responses if less than three (3) bids are submitted.
- c) The proposal will include all solicitation documents and responses, bid summaries along with policy recommendations.
- d) The Selected Respondent shall provide the CHA with proposed renewal costs, along with all solicitation documents according to the Executive Office / BOC meeting calendar timelines, if available, but no later than thirty (30) days before the renewal date
- e) The Selected Respondent must notify CHA Risk Management immediately of any delays in the renewal process that will impact CHA Executive Office and/or BOC meeting timelines.

5. Documentation after renewal - placement of insurance

- a) Deliver final policy by sixty (60) days from renewal date, having reviewed all policies and endorsements for accuracy.
- b) Maintain listing of recurring certificate holder list for all insurance program and issue certificates of insurance within five (5) business days of renewal and no later than fifteen (15) business days;
- c) Review policies and endorsement for accuracy and conformity to specification and negotiated coverages and notify CHA Risk Management of any corrections required from carrier;
- d) Deliver certificates of insurance and auto identification cards upon renewal

6. Claim Related Services

- a) Coordinate with CHA Risk Management and TPA to review, develop or improve claim reporting procedures
- b) Monitor compliance with claims reporting and applicable TPA service instructions
- c) Evaluate and analyze large exposure cases; review and suggest changes to specific claim reserves; ensure the proper carriers are on notice
- d) As a liaison for CHA, work with insurance carriers' claim departments, facilitate the exchange of information among insurers, adjusters, lawyers and other parties to ensure timely settlement of coverage reviews, settlement of claims and recovery of first-party claims
- e) Perform annual audit/review of claims during each policy term

7. Brokerage Services

- a) Perform regular reviews of the current program to identify potential gaps, recommend appropriate changes in retentions, limits, coverage, program structure and discuss potential strategies for improvement, in accordance with industry best practices
- b) Provide a dedicated account service team including professionals with expertise in specialty lines of coverage (i.e., pollution legal liability / environmental insurance) and provide advance notice of any changes in the dedicated account service team
- c) Requests for new certificates shall be issued within one (1) business day after receiving a request from the CHA; and process rush requests within four (4) hours
- d) Produce and verify the accuracy of bills, audits, and any other premium adjustments
- e) Conduct on-site or virtual meetings with CHA Risk Management team on a quarterly or as-needed basis to review current service performance and discuss open items, status of deliverables, and establish future projects and objectives
- f) Provide technology solutions to support Risk Management's Construction, Occupancy, Protection, and Exposure (COPE) data, loss control, development of renewal submission packages
- g) Provide guidance with emerging risk management issues, coverage questions, or perform other consultative services as needed

ARTICLE IV GENERAL INSTRUCTIONS

A. Acceptance of Proposals

Proposals in response to this RFP must be received (electronically) through the CHA Supplier Portal. Proposals must be received electronically no later than **11 AM (CST), September 11, 2025** as listed in the solicitation. **Proposals submitted after the designated date and time will not be accepted for any reason.**

CHA reserves the right to accept or reject any or all proposals, issue addenda, or to waive any informalities. A Respondent whose proposal fails to fully comply with the requirements of the RFP may be determined to be nonresponsive and excluded from further consideration.

B. Time for Receiving Proposals

Proposals received prior to the due date and time will be maintained in a secure place, unopened. No proposal received after the deadline set forth on the cover page of this RFP will be considered. Proposals will not be publicly opened. Once submitted, proposals will become the property of CHA.

C. Right To Cancel

CHA reserves the right to cancel this procurement process whenever the best interest of CHA is served. CHA shall not be liable for costs incurred by Respondents associated with this procurement process.

D. Addenda

Any interpretations, corrections, or changes to the RFP will be made by addenda issued by CHA. Any addenda that are issued will be provided to prospective Respondents, posted on the CHA's Supplier Portal at: <https://supplier.thecha.org>, and noticed on the CHA website. It is the responsibility of the Respondent to inquire of the issuance of any addenda. Respondents shall acknowledge receipt of all addenda in the cover letter of the response. If CHA determines this RFP should be modified, it will inform all prospective Respondents by distributing addendum/addenda to this RFP before the date set for receipt of proposals.

E. False Statements

Any false statement(s) made by the Respondent (s) will void the response and eliminate the Respondent(s) from further consideration.

F. Withdrawal of Proposals

Proposals may be withdrawn by written request by the Respondent. A written withdrawal of a Proposal must be received, prior to the time set for opening of Proposals. A Respondent's negligence in preparing a Proposal creates no right of withdrawal or modification after the date and time set for opening of the Proposals.

G. Award of Contracts

CHA may award one or more Contracts according to the Evaluation Criteria contained in this RFP to responsible and responsive respondents, provided their Proposals are in the best interest of CHA. The Selected Respondent(s) will be notified at the earliest practical date. Each award may be subject to HUD approval. No award may be made to a contractor or firm that is on the list of contractors ineligible to receive awards from CHA or the United States, as furnished by HUD.

CHA reserves the right to reject any and all proposals and reserves the right to secure services solicited by this RFP by means of a non-competitive procurement in accordance with §2 CFR 200.320 (c) or to re-solicit competitive proposals.

H. Notice of Contract Award

Unsuccessful Respondents will be notified in writing after an award of contract has been made by the Contracting Officer and/or Board approval, if required.

I. Right to Protest

In accordance with CHA's Procurement Protest Procedures (copies may be obtained by contacting the department of Procurement and Contracts), all protests regarding this solicitation document must be filed no later than five (5) business days before the due date for proposals. All other protests regarding the evaluation of proposals or award of contract by the Authority must be filed no later than ten (10) business days after the notice of contract award. Any protest filed after such date will not be considered.

J. Preparatory Costs

All costs incurred in the preparation and presentation of Proposals shall be wholly borne by each Respondent. All supporting documentation and manuals submitted with each Proposal will become the property of CHA unless otherwise indicated by the Respondent at the time of

submission. CHA is not liable for any costs incurred by any Respondent prior to issuance of a Notice to Proceed.

K. Confidential Material

Any material submitted by a Respondent as part of a proposal that is to be considered confidential must be clearly marked as such but may be subject to disclosure under applicable law.

L. Subcontract / Sub consultants

All subcontractors proposed to be used under the Contract must be identified within the proposal. If the proposed services include the use of subcontractors, CHA will hold the prime contractor responsible for the proposed services to be provided by the subcontractors.

M. Minimum Wage Requirements

Any award under this solicitation shall be subject to the current local minimum wage requirement and prevailing wage determination for CHA. The minimum wage requirements shall be specifically incorporated as a contractual requirement in any award and agreement resulting from this solicitation for any of the Selected Respondent's covered employees. The Respondent must take the minimum wage requirement and prevailing wage determination for CHA into consideration in determining its staffing plan for services to be performed or provided by the Respondent under its fee proposal and other submittals. Note that Federal wage determinations (either Davis-Bacon or HUD-Determined Wage Rates) preempt any conflicting State prevailing wage rate or the minimum wage requirement when the State prevailing wage rate or the minimum wage requirement is higher than the Federally imposed wage rate (24 CFR 965.101).

N. Disclosure Certification

The Contractor shall be required to make the following certification, which is included in the Contractor's Affidavit, a required submittal to be executed and notarized.

The Contractor certifies to the best of its knowledge and belief that it, its principals and any subcontractors used in the performance of this contract, meet the Agency requirements and have not violated any City or sister agency policy, codes, state, federal, or local laws, rules or regulations and have not been subject to any debarment, suspension or other disciplinary action by any government agency. Additionally, if at any time the contractor becomes aware of such information, it must immediately disclose it to the Agency.

The recommended firm(s) will be required to disclose the following information at the appropriate time during the solicitation process: Contractor's other business relationships including but not limited to: Board affiliations, positions or board memberships with all other non-profit, government and other Chicago businesses.

O. Disqualify for Conflict of Interest

CHA reserves the right to disqualify any Respondent on the basis of any real or apparent conflict of interest that is disclosed by the proposal submitted or any other data available to CHA. This disqualification is at the sole discretion of CHA. Any Respondent submitting a proposal herein waives any right to object to such disqualification now or at any future time, before any body or

agency, including but not limited to, the Board of Commissioners, City Council of the City of Chicago, Mayor's Office of Chicago or any company.

P. Participation by other Local Government Agencies

Other local government agencies ("Local Government Agencies") may be eligible to purchase Services pursuant to the terms and conditions of this Contract if such agencies are authorized, by law or their governing bodies, to execute such purchases, and if such authorization is allowed by the Chicago Housing Authority Contracting Officer, and if such purchases have no significant net adverse effect on CHA and result in no observed diminished ability on the Respondent to provide the Services to CHA or user departments pursuant to such purchases. Local Government Agencies shall include without limitation: City of Chicago, Chicago Park District, Chicago Public Schools, Chicago Transit Authority, City Colleges of Chicago. All purchases and payment transactions shall be made directly between the Bidder and the requesting Local Government Agency; CHA shall not be responsible for payment of any amounts owed by any Local Government Agency to Bidder. CHA assumes no authority, liability or obligation on behalf of any Local Government Authority

Q. Bribery, Price Fixing, or Fraud

No person or business entity shall be awarded a contract or subcontract for a period of five years from the date of conviction or entry of a plea or admission of guilt, if that person or business entity:

1. has been convicted of an act committed of bribery or attempting to bribe an officer or employee of a unit of state or local government or school district in that officer's or employee's official capacity; or
2. has been convicted of an act of bid-rigging or attempting to rig bids as defined in the Sherman Anti-Trust Act and Clayton Act (15 U.S.C. §1 et seq.), or under the laws of the State of Illinois; or has been convicted of an act of price-fixing or attempting to fix prices as defined by the Sherman Anti-Trust Act (15 U.S.C. §1 et seq.) or under the laws of the State of Illinois; or
3. has been convicted of defrauding or attempting to defraud any unit of state or local government or school district; or
4. has made an admission of guilt of such conduct as set forth in subparagraph 1 through 3 above, which admission is a matter of record, whether or not such person or business entity was subject to prosecution for the offense or offense admitted to; or
5. has entered into a plea of nolo contendere to charges of such conduct, as is set forth in subparagraphs 1 through 3 above.

For purpose of the section, "business entity" means a corporation, partnership, trust, association, unincorporated business or individually owned business. Where an official, agent or employee of a business entity committed the acts as set forth in subparagraphs 1 through 5 above on behalf of such entity and pursuant to the direction or authorization of a responsible official thereof, the business entity shall be chargeable with the conduct and be disqualified.

A business entity shall also be disqualified if it employs as an officer any individual who was an officer of another business entity at the time the latter committed a disqualifying act as set forth in subparagraphs 1 through 5 above.

A business entity shall also be disqualified if any owner directly or indirectly controls 20% or more of the business entity and was an owner who directly or indirectly controlled 20% of another business entity at the time, such business entity committed a disqualifying act as set forth in subparagraphs 1 through 3 above.

Any contract found to have been awarded in violation of this Paragraph may be voided at the discretion of CHA.

ARTICLE V SUBMITTAL REQUIREMENTS

A. Format

Respondents shall present their proposals as a firm offer which, if accepted by CHA in its entirety, shall be binding between the parties. Electronic responses submitted via the CHA Supplier Portal at <https://supplier.thecha.org> only require one (1) complete proposal. The Respondents must also include an indexed version of each submittal section of the electronic proposal shall be formatted, labeled and separated into a different file.

Note: There is no maximum file capacity size when uploading attachments in the Supplier Portal. *If you receive an error message that states the "Maximum size is: 50" while uploading an attachment in the Supplier Portal, that error message is referring to the file naming size. The name of your file cannot be more than 50 characters.*

Proposals not containing all the submittal requirements (See Attachment C – Vendor Submission Checklist) may be deemed non-responsive to this RFP.

B. Cover Letter and Executive Summary Form

A cover letter shall be submitted on the Respondent's letterhead, signed by a principal and the joint venture partner, if applicable. The cover letter must contain a plan explaining how services will be performed; a commitment to provide the services described in the Scope of Services of this RFP; and indicate that the offer is good for one hundred-eighty (180) days from submittal of proposal. In the cover letter, the Respondent shall also include an acknowledgement that the Respondent has read and understands the requirements of the RFP including, but not limited to, the terms and conditions of the attached Professional Services Agreement (refer to Article IX), CHA's Diversity and Inclusion requirements, Insurance and Indemnification requirements, and will comply with these requirements if awarded a contract. Proposers and Bidders shall also include the Executive Summary Form (Article X).

C. Qualifications and Experience

1. The Respondent must be a licensed insurance brokerage firm with over 15 years of experience providing insurance brokerage and consulting services to public sector clients, including public housing authorities, municipalities, and non-profit housing organizations. The firm must have significant experience managing large property schedules, general liability exposures, various professional liability lines, and Owner Controlled Insurance Programs (OCIP).
2. The Respondent must describe its qualifications, resources and experience as it pertains to the requested services. The Respondent must demonstrate it has the

experience and capacity to complete all of the required services while meeting deadlines established for the task. Key qualifications include:

- Proven track record in designing, marketing, and placing complex insurance programs for agencies serving diverse populations and operating under HUD oversight;
 - Dedicated public sector practice group with a deep understanding of regulatory requirements and federal procurement standards;
 - Successfully supported public housing clients in Illinois and nationwide, delivering cost savings, risk reduction, and streamlined claims resolution;
 - A multidisciplinary team of licensed brokers, claims advocates, analysts, and risk consultants with credentials including CIC, CPCU, ARM, and CRIS designations;
 - Access to major domestic and international insurers, enabling competitive pricing and broad coverage terms;
3. Respondent's proposal **shall** include the following information: (1) the legal name of the firm, (2) a description of the primary area of expertise of the firm, (3) the names of the firm's principal(s), (4) the address, telephone number and names of individuals to be contacted, (5) the size of the enterprise, (6) all of the firm's registration/license numbers(s) in Illinois, (7) the length of time the firm has worked in its area of expertise generally, and in Illinois if different for a different length of time, and (8) the firm may submit a general brochure of their work.

D. Approach/Work Plan

The Respondent must provide a narrative describing its approach to the Statement of Work including, but not limited to, project management systems to be utilized, plans for effective communications including reporting tools, timeline, and specific approaches to technical problems that may lead to cost savings for CHA. At a minimum, Respondents should address the information outlined below:

- Respondent will deliver all required services through a dedicated team of experienced professionals, responsible for strategic planning, insurance placement, claims support, and policy servicing. If a joint venture is proposed, each party's role will be clearly defined, with one lead entity responsible for overall coordination and accountability.
- Respondent demonstrates a full understanding of CHA's needs, including HUD compliance, large property schedules, and public-sector risk exposures. Services will begin with a comprehensive program review and include a structured annual service plan covering renewals, reporting, and risk management.
- CHA staff will be engaged through scheduled check-ins, collaborative planning, and access to a secure client portal or reporting dashboard. A single point of contact will manage communications, and CHA Risk Management will receive timely updates on claims, coverage changes, insurance renewals and market trends. Internal staff training will also be offered to support knowledge sharing and informed decision-making.
- The Respondent will provide a sample stewardship report for similar clients. At a minimum, report shall include:
 - Complete list of insurance policies currently in force for each program with a summary of coverages;

- Evaluation of overall insurance programs;
- Forecast of market conditions and renewal costs;
- List of modifications needed to service requirements;
- Potential problem identification and the presentation of possible solutions, for issues such as safety hazards and uninsured/underinsured exposures
- Review loss runs, (generated by TPA) with a summary of activity including open and closed claims with an emphasis on leading loss causes and large exposure claims;
- Overview of future goals and long-term strategy;
- Broker's service analysis; identify program successes and areas for improvement.

E. Work History with CHA and other Local Public Agencies

Respondent must list and briefly describe any past work history with CHA and other Local Public Agencies, including the specific project worked on or the specific products delivered to CHA. The project descriptions shall include, at a minimum, the scope of work performed, the location, dollar value, and list the Respondent's key personnel on the project. For each project listed, the Respondent shall provide the client's name, the contact person and their title, address and phone number. Indicate **N/A** if Respondent does not have any work history with CHA and other Local Public Agencies.

F. Past Performance

The Respondent must provide a minimum of three (3) and a maximum of five (5) project descriptions that best demonstrate the Respondent's ability to perform the work outlined in the Scope of Services including work performed for CHA as one of the projects identified, if applicable. Each project description must be presented as a concise narrative (maximum one page each) and must address the following:

1. Scope of Services provided, including the types of insurance coverages marketed and placed, client location, total insured values, program structure, limits, deductibles/SIRs, and the key personnel assigned to the engagement;
2. Success Metrics, such as improved pricing, expanded coverage, improved carrier relationships, and client retention. Explain how outcomes in past engagements demonstrate your ability to deliver value to CHA.
3. Provide insurance program comparisons or benchmarking data that demonstrate how your proposed or past placements compare to those of comparable public housing agencies nationwide. Include details such as premium per \$100 TIV, SIR levels, policy limits, market availability, and insurer financial strength ratings where applicable.
4. Summarize major challenges encountered during the engagement (e.g., hard market conditions, limited carrier interest, emerging risks), and describe how those challenges were successfully addressed.

5. Include any applicable service-level metrics or performance indicators from the engagement (e.g., certificate turnaround time, policy issuance speed, accuracy of binders, client satisfaction scores)
6. Disclose any contractual defaults and how they were cured including CHA and non-CHA contracts.

G. References

Proposers are required to provide at least three (3) references, excluding CHA, from within the past three (3) years for projects and areas of responsibility similar to those the Respondent desires to provide herein. Please include company name, contact person, mailing address, telephone number and email address. Please include a brief but detailed explanation of services provided and submit with your proposal. CHA will email any questions to the references included in your submission. Please inform your references that they will be contacted by CHA. (Attachment E)

H. Organization Structure and Key Personnel

1. The Respondent must provide the name and resume of the program executive that will be accountable for the CHA project. Key Personnel shall not be replaced without the prior written approval of CHA.
2. The Respondent must provide an organization/structure chart and include its key technical and consulting personnel who will be assigned to the CHA project team along with their resumes and provide the following information including, but not limited to:
 - i. Detail concerning each primary team member working with the Respondent, as well as those working in a subcontracting capacity. List all current projects that each primary team member may be working on during the term of the Contract, and indicate which team member will have primary responsibility for the CHA account;
 - ii. Correlation of team members to the tasks each will be performing;
 - iii. Describe previous, related experiences and projects (preferably public housing); and
 - iv. If Respondent proposes staff to work on the CHA account who are not located in a Chicago area office (within 25 miles of the city), indicate their office location.
3. If a Respondent is planning to joint venture or subcontract with other companies, incorporate the relationship on the organization chart and provide letters of interest from those firms, the names and credentials of their principals and key personnel, and include their resumes along with evidence of any required licenses. The Respondent should describe the roles and responsibilities of their subcontractors, including the key personnel as they relate to the Scope of Services for the RFP.

I. Fee Proposal Form (refer to Attachment A)

Respondent must complete the Fee Proposal Form in its entirety and return it with this RFP package (refer to Attachment A).

J. Insurance Requirements

The Respondent must submit a current certificate of insurance in the form required by this RFP. At the time of contract award, the Selected Respondent shall be required to provide an updated certificate of insurance, and all required endorsements adding CHA and any other required party as an additional insured, meeting the CHA's minimum insurance requirements.

K. Joint Venture Agreement

Firms entering into a joint venture must submit a copy of its joint venture agreement and all required submittals must be signed by a principal of each joint venture partner including, but not limited to, subcontractors' information submittals, and MBE/WBE/DBE and Section 3 Utilization Plans. Indicate **N/A** if Respondent will not be part of a joint venture agreement.

L. Liens, Suits, Disputes, Defaults and Judgments

Respondents shall include a detailed description of any disputes they currently are involved in, as well as a complete list of any lawsuits, disputes, defaults and judgments occurring within the last five (5) years, and all current liens, lawsuits, disputes, defaults, and judgments pending including Fair Housing claims, regulatory or tax credit violations. Indicate N/A if Respondent does not have any disputes, lawsuits, judgments, disputes, defaults or liens described above.

M. Audit Findings and Other Compliance Reports/Evaluations

Respondents shall submit to CHA's Department of Procurement and Contracts any third party reports or evaluations of Respondent's compliance with any applicable laws, rules, regulations, policies procedures, contract provisions, or requirements with respect to Respondent's performance of services similar in nature to those being solicited by this RFP in the past five years, including, but not limited to, any and all final findings made by an Office of the Inspector General ("OIG") or Internal Auditor (including those conducted by CHA's Inspector General and/or CHA's Internal Auditor) with respect to Respondent's performance of services, compliance with terms of a contract, findings in an Administrative or Internal Investigation, or any findings of failure to cooperate in an OIG inquiry or with Internal Auditors. Indicate **N/A** if Respondent does not have any findings described above.

N. Debarment Statement

Respondent shall submit a statement that the Respondent, its joint venture partner, if applicable, its subcontractors, vendors and staff are not debarred, suspended or otherwise prohibited from conducting business with any Federal, State or local agency.

O. Economic Disclosure Statement

Respondents must complete the economic disclosure statement and affidavit. The economic disclosure forms must be completed by the Respondent and all subcontractors in its entirety and

notarized. Privately held firms and not-for-profit organizations must disclose the board of directors/corporate officers. All firms must disclose the percentage of ownership. Failure to provide complete ownership information may cause your response to be deemed non-responsive.

P. Financial Information

The Respondent/Financially Responsible Party shall demonstrate its financial responsibility by submitting the most recent two years of audited, reviewed or compiled financial statements prepared by a third party licensed Certified Public Accountant (CPA). Listed below are the minimum acceptable required documents based upon the amount of the procurement:

The Respondent must provide Financial Statements, which are compiled, reviewed and/or audited as defined below (which may be subject to different levels depending upon the Respondent's proposal and the projected contract value of the award), and which consist of:

- Accountant's Report
- Balance Sheet (last 2 years)
- Income Statement (last 2 years)
- Cash Flow Statement (last 2 years)
- Financial Statement Footnotes (if applicable)

For proposals or contracts awards valued at less than \$500,000, the Respondent must provide the IRS tax transcript.

For proposals or contract awards valued at less than \$1,000,000 the Respondent must provide complied financial statements.

For proposals or contract awards valued at less than \$2,500,000.00, the Respondent must provide reviewed financial statements.

For proposals or contract awards valued in excess of \$2,500,000.00, the Respondent must provide audited financial statements.

CHA will also evaluate the respondents based upon analysis of third-party reporting agencies, regulatory agencies, bureaus, etc., as it deems necessary to determine the financial adequacy of the respondent entity and confirm that the entity is in good financial standing with governmental agencies.

Other considerations in the evaluation of the financial condition of Respondents follow:

- Financial statements must be from a legal business entity (i.e., corporation, partnership, LLC, etc.). The entity name and address listed on the Financial Report should match the address on file with Dun & Bradstreet report in order for CHA to perform financial review.
- If respondent is not able to provide the Financials 6 months after their fiscal year end, respondents should provide the reason for delay or non-completion.
- Newly created entities (partnerships, LLC's, etc.) must provide financial statements from the entity's general partner and/or any other financially responsible entity that collectively can demonstrate the capability to complete the contract.
- Internally prepared business entity financial reports generated by the respondent will not be accepted.

- Personal financial statements or tax returns will not be accepted.
- CHA reserves the right to request Dun & Bradstreet reports in order to make an award determination. Vendors must provide the address on file with Dun & Bradstreet if it differs from the address listed on the proposal.
- CHA reserves the right to request additional information to complete the financial evaluation and review of any respondents.

Q. Vendor Submission Checklist

Refer to Attachment C for all required submittal requirements. The following documents are exhibits to this RFP and can be found at www.thecha.org/doing-business:

- A. Contract Compliance Certification
- B. Letter of Intent-MWDBE and Section 3 Subs
- C. Waiver Request-M/W/DBE (If Applicable)
- D. Submittal Requirements Checklist
- E. Contractor's Affidavit
- F. Statement of Bidder's Qualification
- G. Economic Disclosure Statement
- H. HUD Form 5370 or 5370-C

Proposals not containing all submittal requirements may be deemed Non-Responsive.

ARTICLE VI INSURANCE REQUIREMENTS

Insurance is applicable to All Contracts as approved by CHA Risk Management.

The Contractor shall furnish the Chicago Housing Authority (CHA) with satisfactory evidence (subject to approval from CHA) that it has the following insurance coverage(s). 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) **Workers' Compensation** – Statutory Limits (Coverage A) and Employer's Liability (Coverage B) in an amount of not less than \$500,000/\$500,000/\$500,000.
- (b) **Commercial General Liability** - Insurance in the amount of \$1,000,000 per occurrence with an aggregate of not less than \$2,000,000.
- (c) **Automobile Liability** – when any motor vehicles (owned, unowned and hired) are used in connection with the services to be performed, the contractor shall provide Comprehensive Automobile Liability Insurance with limits of not less than \$1,000,000 per occurrence CSL, for Bodily Injury and Property Damage.
- (d) **Professional Liability Insurance** – covering acts, errors or omissions shall be maintained with limits of not less than \$1,000,000 per occurrence. When policies are renewed or replaced, the policy

retroactive date must coincide with or precede, the start of Services under the Contract. A claims-made policy which is not renewed or replaced must have an extended reporting period of two (2) years.

Related Insurance Requirements:

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

It is understood and agreed to by the parties hereto that Chicago Housing Authority and others listed below shall be included as Additional Insureds on Vendor's liability policies, with the exception of Professional Liability and Employer's Liability and such insurance is primary to and will not seek contribution from any insurance, deductibles, self-insured retentions and/or self-insured programs available to 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 Chicago Housing Authority, Chicago Housing Administration, LLC; and/or other Partnership, Limited Liability Company as established by CHA; its respective commissioners, board members, officers, directors, agents, property management firms, agents, employees, invitees and visitors.

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

Prior to the issuing of the Notice to Proceed by the CHA, the Vendor shall submit a Certificate of Insurance via *PINS Advantage Certificate Tracking System*, evidencing compliance with the insurance requirements set forth above. You will receive an email with instructions for the submission of your insurance. Copies of the endorsement(s) adding the CHA to Vendor's policy as an additional insured are required upon request. Updated Certificates of Insurance are required for policies which renew during the term of this Agreement or extensions thereof. Under no circumstances shall the Vendor allow any required coverage to lapse, cancel or non-renew throughout the duration of the Agreement or extensions thereof.

The Authority in no way warrants that the minimum limits contained herein are sufficient to protect the Authority from liabilities that might arise out of the performance of the work under this Agreement by the Vendor or its Subcontractors. The Vendor shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages. The Vendor is not relieved of any liability or other obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain sufficient insurance.

The Vendor shall require all subcontractors to carry the insurance required and adhere to the same requirements and conditions as outlined above.

The Vendor 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 Vendor and/or any of its subcontractors.

ARTICLE VII EVALUATION PROCESS

Proposals will be scored on a (100) point scale by an evaluation committee scoring the technical criteria in accordance with the evaluation criteria set forth below, with CHA Contract Requirements scored by Compliance and Pricing scored by Procurement. Each Respondent must indicate its fees via Attachment A: Fee Proposal. Fees must be reasonable and justifiable and must reflect the proposed approach/work plan, which is being evaluated under Article VII. CHA will make an award to the responsive and responsible Respondent whose proposal conforms to the solicitation and whose combined total score for price, compliance, technical factors and oral presentations provides the best value. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of CHA. CHA reserves the right to perform site visits that may be included in the evaluation scoring.

CHA will utilize a ratio method for scoring proposed fees. With this method, the proposal with the lowest price receives the maximum points allowed (20 points). All other proposals will receive a percentage of the points available based on their price relationship to the lowest. This is determined by applying the following formula:

$$(A/B) \times C = D$$

A—the lowest Respondent's price.

B—the Respondent's price being scored.

C—the maximum number of price points available. D—Respondent's pricing score (points).

Lowest proposed price divided by the Respondent's price times the maximum points allowed.

Example: The lowest proposed price is \$100,000. The next lowest proposal price is \$125,000. The maximum point total available for price is 20 points. The proposal with the \$100,000 price would receive 10 points (because it is the lowest of all proposals). Using the lowest proposal price as a base (or numerator), we would then divide the second lowest price by the first lowest price (denominator) and then multiply the result by the max point value (20) to determine the point value relative to the lowest price, as follows:

$$\$100,000/\$125,000 = 0.80$$

$$0.80 \times 20 = 16 \text{ (points)}$$

As such, the proposed price of \$125,000 would be awarded 16 points out of a maximum point value of 20.

Materials, information or explanations should be included in each Respondent's proposal, as required in Article V Submittal Requirements, and/or as otherwise necessary to allow the following evaluation criteria to be considered:

EVALUATION CRITERIA	MAXIMUM POINTS
QUALIFICATIONS AND EXPERIENCE (TECHNICAL): <ul style="list-style-type: none"> The Respondent has demonstrated experience providing insurance brokerage services for public housing agencies or similar government/public entities. (10 Points) The Respondent demonstrates that it meets all of the requirements and qualifications, staff holds relevant credentials, and has staff capacity to complete the Statement of Work. (10 Points) Experience with large-scale property, casualty, liability, and OCIP insurance programs. (10 Points) 	30
APPROACH AND WORK PLAN (TECHNICAL): <ul style="list-style-type: none"> The Respondent provides a clear and detailed overall strategy for servicing the account, including communications, renewals, claims assistance, and risk management as defined and described in the Scope of Services/Statement of Work. The workplan outlines resources and personnel along with their expected contribution to services (15 Points) Respondent demonstrates technical capabilities and management plan. The Respondent's services include technology and resources to provide value-added services and innovative solutions. (5 points) The Respondent demonstrates a full understanding of CHA's needs, including HUD compliance, managing large property schedules, and public-sector risk exposures; outlines ability to perform a comprehensive program analysis and includes a structured annual service plan covering renewals, reporting, and risk management topics. (10 Points) 	30
REFERENCES AND PAST PERFORMANCES (TECHNICAL): Submit resumes or corporate personnel profiles with relevant experience for each of the key technical personnel and key support personnel committed to the project(s); Demonstrates history of successful placement of similar insurance programs. (10 Points)	10
Contract Goals: <ul style="list-style-type: none"> Demonstrated understanding and quality of CHA's contract requirements, including MWD/BE and Section 3 goals (10 Points) 	10
PROPOSED FEES <ul style="list-style-type: none"> Respondent's overall proposed fee for Insurance Brokerage Services as outlined within the statement of work. (20 Points) 	20
TOTAL COMBINED POINTS for TECHNICAL, MBE/WBE/DBE, SECTION 3 PLAN and PROPOSED FEES	100

After the evaluation committee has evaluated and scored the Respondents' proposals, the MBE/WBE/DBE and Section 3 Business Utilization Plans and the proposed fees have been evaluated and scored, CHA's Contracting Officer shall establish the competitive range. If deemed necessary for the purpose of efficiency and economy, CHA has the right to limit the number of Respondents in the competitive range. Respondents within the competitive range will be notified

and unless otherwise indicated, will be required to participate in presentations/discussions with CHA. CHA may also require further information or clarification from the Respondents in the competitive range regarding their proposals prior to the presentations/discussions.

CHA, however, reserves the right to make its decision to award a contract based solely on the written submitted Proposals without any requests for presentations, formal interviews, negotiations or further discussions.

The objective of the presentations/discussions is to answer questions, clarify issues, and/or provide additional information regarding a Respondent's proposal and negotiate. Presentations will be evaluated according to the criteria established by the evaluation committee. Respondents in the competitive range will be scored on a maximum 30-point scale. The resulting points will be added to their written proposal scores for a total score.

ORAL PRESENTATION EVALUATION CRITERIA	MAXIMUM POINTS
TOTAL ORAL PRESENTATION POINTS	30

Following the presentations, the evaluation committee members will evaluate and summarize their findings for each firm that participates in the presentations, and the evaluation committee will submit scores to Procurement. CHA will make an award to the responsive and responsible Respondent(s) whose proposal conforms to the solicitation requirements and whose combined total score for price, compliance, technical factors and oral presentations provides the best value to CHA. Notwithstanding anything contained herein, CHA reserves the right to make an award based on any other relevant considerations and in the best interest of CHA.

CHA reserves the right to reject any and all proposals and reserves the right to secure services solicited by this RFP by means of a non-competitive proposal process in accordance with §2 CFR 200.320 (c) or to re-solicit competitive proposals.

ARTICLE VIII CONTRACT REQUIREMENTS

CHA is committed to contracting with vendors who share our values for inclusive and equitable contracting opportunities. CHA strives to be fair, transparent and practical, and to optimize the use of public funds through purchasing decisions.

1. Summary of Contract Requirements

Type of Contract	M/W/DBE	Section 3 (Labor Hours)	S3 Business subcontracting (> \$250,000)	Davis Bacon
Construction	Yes	Yes	Yes	Yes
Professional Service (licensure required)	Yes	No	Yes	No
Professional	Yes	Yes	Yes	No

Service (non-licensure required)				
Professional Services (direct services to residents)	Yes	Yes	No	No
Material & Supply	Yes	No	Yes	No

* if not self-performing

Minimum Contract Requirements:**Minority/Women/Disadvantaged Business Enterprises (M/W/DBEs)**

Certified Minority, Women, and Disadvantaged Business Enterprises (M/W/DBEs) shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with federal funds. Vendors and their subcontractors or suppliers must take all necessary and reasonable steps to ensure that M/W/DBEs have the maximum opportunity to compete for and perform contracts financed in whole or in part by federal funds. CHA establishes minimum thresholds for all contracts over \$50,001. Vendors unable to meet the requirement may propose indirect participation subject to CHA's written approval.

Section 3 Business Subcontracting – For contracts >\$250,000, vendors are required to subcontract to Section 3 Businesses, unless self-performing. To locate a Section 3 Business, visit the [Workforce Opportunity Resource Center](#) (WORC) site. Professional Services that directly provide social support services for CHA residents are not required to sub-contract to Section 3 Businesses but are encouraged to sub-contract when feasible. Vendors unable to meet the requirement may propose indirect participation subject to CHA's written approval. These may include, but are not limited to mentorship programs, internships, training, and employment opportunities for non-CHA funded projects, or payment into CHA's Workforce & Education Fund.

Section 3 Labor Hours

CHA supports HUD's Section 3 requirement which counts labor hours. All applicable contracts **require at least 25% of the labor hours** performed on a project are done so with Section 3 workers and businesses, of which 5% of those hours must be performed by Targeted Section 3 workers (i.e. CHA residents and HCV participants). Vendors will report these hours via B2Gnow and/or LCPtracker or through required affidavits based on the contract type (HUD Section 3 24 CFR part 75).

Davis Bacon and Minimum Wage Requirements:

The Davis-Bacon & Related Acts apply to construction contracts over **\$2,000** and ensures that all construction employees are paid under the US Department of Labor's wage decision. Union contractors must ensure that Davis-Bacon wages are met, in accordance with the contract. All CHA contracts must comply with the current local Minimum Wage requirement. The Minimum Wage Requirements shall be specifically incorporated as a contractual requirement in any award and agreement resulting from this solicitation for any of the Selected Respondent's covered employees. The Respondent must consider the Minimum Wage Requirement in determining its fees for services to be performed or provided by the Respondent under its fee proposal and other submittals. Note that Federal wage determinations (either Davis-Bacon or HUD-Determined

Wage Rates) preempt any conflicting State prevailing wage rate or the Minimum Wage Requirement when the State prevailing wage rate or the Minimum Wage Requirement is higher than the Federally imposed wage rate (24 CFR 965).

The following chart indicates the goals set by the CHA for each type of contract.

Minimum Thresholds

Type of Contract	Contract Amount	MBE/WBE/DBE Participation	Section 3 Business Subcontracting (>\$250,000)	Section 3 Labor Hours (25% of which 5% is through CHA resident hires)***
Construction	\$50,001+	30%	10%	25%
Supply & Delivery	\$50,001 +	20%	3%*	N/A
Professional Services	\$50,001 +	20%	3%**	25%

*Or indirect **excludes direct support service providers *** Required regardless of contract amount

1. Utilization Plan:

This chart is a list of items needed to evaluate a full utilization Plan (UP). All respondents to CHA solicitations must submit a UP which enables CHA to evaluate how they will fulfill contract requirements.

Document Name	To be Completed By	Details
Utilization Plan (UP) M/W/DBE and Section 3 Businesses	Prime Contractor	This Excel worksheet will include all M/W/DBE and Section 3 Businesses subcontracting as well as proposed indirect, etc.
Letter of Intent	Each M/W/DBE and Section 3 subcontractor listed on the UP including a self-performing Prime Contractor	If a Prime is a M/W/DBE and they are self-performing, they must submit a Letter of Intent. A Letter of Intent for each sub-contractor that is MWD/BE or Section 3 Business must also be submitted. The information outlined in the UP must correspond with the Letters.
Letter of M/W/DBE Certification	Each M/W/DBE listed on UP, including a self-performing Prime Contractor	This form must be submitted with every UP and Letter of Intent and include current certification letters. Applications are not accepted.
Waiver Request-M/W/DBE	Prime Contractor	This form is only to be used if a vendor cannot meet their subcontracting requirements and all good-faith efforts, including indirect participation, have been

		exhausted. The form must include (1) the scope of work and (2) the reason the Prime cannot meet the commitments outlined.
Other Economic Opportunities (OEO)	Prime Contractor	If vendor is unable to subcontract to a Section 3 Business in full or in part they will need to propose indirect participation through the OEO section on the UP, or make commensurate payment upfront into the Workforce and Education Fund, subject to approval by CHA.

2. Reporting Requirements:

Contract Requirement	System	Details
Construction Contracts	LCPtracker	Certified Payroll Reports must be entered into LCPtracker weekly. This system also tracks compliance with Davis Bacon and Section 3 hours.
Professional Services	B2GNow	Payments must be entered into B2Gnow for every pay application monthly. This system tracks and verifies Prime and Subcontractor payments made and received.

Additional Information:

(a) COUNTING M/W/DBE AND SECTION 3 BUSINESS (S3B) CREDIT: A business that is both self-identified /certified as a Section 3 Business and certified as a M/W/DBE will count towards subcontracting requirements for both the M/W/DBE and Section 3 sub-contracting requirements.

(b) PROVIDING OPPORTUNITIES TO SECTION 3 WORKERS: In accordance with 24 CFR part 75.9, Prime and sub-contractors (including Section 3 Businesses) on CHA/HUD-funded contracts must ensure that Section 3 workers are provided economic opportunities with the following preference when applicable: a) residents of the project where the assistance is being provided; b) residents of other public housing or Section 8; c) Youthbuild participants; and d) resident of the metropolitan area.

(c) SUBSTITUTION/REMOVAL OF SUBCONTRACTOR: A prime contractor that needs to remove or substitute a subcontractor on its approved utilization plan must submit a written request for the removal or substitution of the subcontractor concerned. Only when Department of Procurement and Contracts (DPC) approves such a request in writing can the removal or substitution of the subcontractor be done by the prime contractor. Under no circumstance should a prime contractor unilaterally remove or substitute a subcontractor on its CHA/HUD-funded contract without prior approval by DPC.

Definitions

Section 3 Business are defined a business that either is a) 51% owned by public housing or housing choice voucher participant(s); b) 51% owned by a low-income person(s); or c) 75% of the labor hours are performed by low-income workers.

Davis-Bacon and Related Acts directs the US Depart of Labor to determine prevailing wage for construction projects.

Indirect Participation refers to the value of payments made to MWD/BE firms for work that is done outside of the proposed project or commensurate value to S3 Business or CHA residents/participants in other economic opportunities.

Additional information on CHA's contract requirements and forms can be found at <https://www.thecha.org/contracting-opportunities/cha-contract-requirements>.

ARTICLE IX STANDARD PROFESSIONAL SERVICES AGREEMENT

Upon the award of a contract, the Selected Respondent(s) will execute CHA's Professional Services Agreement in substantially the same form with the same terms and conditions as set forth in the attached Agreement. A Respondent shall include, as part of its cover letter for its proposal to CHA, an acknowledgement that it has read, understands and accepts the terms and conditions of the Agreement. **If there are any terms and conditions to which the Respondent has objections, such objections and the specific section numbers must be noted in the cover letter. The Respondent's proposed alternative language, if any, must be included as an attachment to the cover letter and such requests for revisions will be taken into consideration when determining a Respondent's responsiveness to the RFP.** A Respondent who fails to provide objections and propose alternative language shall waive its right to subsequently object to any terms of the agreement if awarded a contract by CHA (refer to Attachment D).

[REMAINDER OF THIS PAGE HAS BEEN LEFT INTENTIONALLY BLANK]

ARTICLE X EXECUTIVE SUMMARY FORM

- A. The undersigned, hereby acknowledges having received a full set of the Request for Proposal (RFP) Event # 3298 Insurance Brokerage & Consulting Services.
- B. The undersigned proposes, in accordance with all terms of the contract documents of which this proposal is a part, to perform all services in accordance with the terms and conditions specified herein. The proposer also agrees that this proposal to offer services to CHA will remain in effect for one hundred eighty (180) days from the date on which proposals are due unless a written letter of withdrawal is submitted to CHA Contracting Officer prior to the award of the contract.
- C. All prices quoted herein shall remain firm for the period of this contract and shall not increase during the initial term of the contract.

D. Company's Name: _____

Address: _____

City, State, Zip Code: _____

I do solemnly declare and affirm under penalty of perjury that the contents of the forgoing documents are true and correct, and that I am authorized, on behalf of the firm, to commit to this proposal.

Name of Preparer (print)

Title

Signature

Date

Attesting Signer's name (required for corporations)

Title

Attesting Signature (required for corporations)

Title

Contact Person's Name and Title

Telephone Number

Fax Number

Email Address

Note: Executive Summary Sheet must be completed, or Proposal may be deemed non-responsive. Rubber-stamped or typed signatures will disqualify your proposal

ATTACHMENT B**LETTER OF INTENT TO SUBMIT A PROPOSAL
REQUEST FOR PROPOSALS (RFP) EVENT # 3298
INSURANCE BROKERAGE & CONSULTING SERVICES
Risk Management**

I, _____, the undersigned being a duly authorized official of _____ hereby acknowledges receipt of the above referenced RFP offering and certify the intent of this firm to submit a Proposal in response to the Request.

PLEASE EXECUTE AND SUBMIT THIS FORM THE SUPPLIER PORTAL AT [HTTPS://SUPPLIER.THECHA.ORG](https://supplier.thecha.org). NO LATER THAN TUESDAY, SEPTEMBER, 09, 2025 BY 11:00 AM, CST.

FIRM'S NAME:

ADDRESS:

CITY: _____ STATE: _____ ZIPCODE: _____

TELEPHONE: _____ WEBSITE: _____

PRINCIPAL CONTACT: _____ TITLE: _____

SIGNATURE: _____ DATE: _____

DIRECT PHONE: _____ EMAIL: _____