



# COMPREHENSIVE RESIDENT ASSESSMENT SERVICES

## RFQ #2018-0091

### 1.1 About AHA

The Housing Authority of the City of Atlanta, Georgia (“AHA”) is the largest housing authority in Georgia and one of the largest in the nation. AHA provides and facilitates affordable housing resources for nearly 22,000 low-income households comprised of approximately 50,000 people. These affordable housing resources include AHA-owned residential communities, AHA-sponsored mixed-income, mixed-finance residential communities, tenant-based vouchers, HomeFlex Program (formerly Project Based Rental Assistance Program), supportive housing arrangements and homeownership opportunities.

AHA has broad corporate powers including, but not limited to, the power to acquire, manage, own, operate, develop and revitalize affordable housing. AHA’s programs are funded and regulated by the U.S. Department of Housing and Urban Development (“HUD”). Using its Moving to Work flexibility, AHA has implemented a variety of innovations that benefit low-income families and expand housing choice.

AHA’s approach to providing quality affordable housing and human development services is based on the belief that people can do better when given access to quality living environments and the tools they need to become self-sufficient. To learn more about AHA and its history, mission and business plan, Respondents are encouraged to visit AHA’s website [www.atlantahousing.org](http://www.atlantahousing.org).

### 1.2 Solicitation Purpose

It is the intent of The Housing Authority of the City of Atlanta, Georgia (AHA) to enter into a contract with a qualified firm to design, conduct, and analyze a Comprehensive Resident Assessment (“Services”). AHA launched its PPI division to carry out the strategic vision of creating an entryway and roadmap to self-reliance by providing residents’ programs and services that concentrate on 5 focus areas:

- Family Independence & Economic Advancement
- Digital Literacy & Connectivity
- Health & Wellness
- Student Achievement
- Volunteerism

A detailed description of the 5 focus areas is available in the AHA’s MTW Annual Plan<sup>i</sup> and 5-Year Plan, Vision 2022<sup>ii</sup>.

The overall goal is to engage AHA residents in an assessment intended to inform PPI’s strategy. The assessment will serve as the catalyst for receiving residents’ feedback, which is pertinent information needed to inform the development of responsive programmatic and funding decisions for PPI’s human development programs.

Preference will be given to the Respondent who can demonstrate leverage of other resources, including both public and private financial and in-kind resources to deliver a comprehensive program for residents at the AHA-Owned Highrise Communities. The comprehensive services must focus on providing connection and utilization of mainstream, community-based services necessary to enable the residents to achieve personal life goals and maintain independence within the community.



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The Comprehensive Resident Assessment should identify and describe complex social phenomena using research and evaluation methods that link results to action items aligned with PPI's 5 focus areas. The methodological framework should center on the experiences and perceptions of AHA's residents to provide an opportunity to include their voice in the decision-making process. Traditional needs assessments have been designed to evaluate gaps between current situations and desired outcomes, while exploring possible solutions for gaps. PPI seeks to extend traditional needs assessment paradigms by employing a methodological framework that concentrates on residents' assets and resources. By employing a methodology designed with extensive participant inclusion, PPI will be able to identify strengths within residents and draw on these strengths as the basis for redesigning and establishing new programs. The Comprehensive Resident Assessment will provide findings on individual and social determinants that affect a wide range of human development factors including functioning, quality of life, outcomes and risks. This type of project is a "mega level assessment" utilizing an approach that focuses on societal values with a vision of creating the world we want for the future generation.

The Comprehensive Resident Assessment should implement new, culturally competent, innovative research approaches with creative focus. AHA residents ages 13 and older should be invited to participate in the Comprehensive Resident Assessment across housing program types (Housing Choice Voucher Program ("HCVP"), Homeflex, Mixed, and AHA-Owned). Some residents may require additional assistance due to language barriers, digital divide, disabilities, and literacy challenges. Proposals should state how the firm will accommodate these issues. The demographic totals and sample size for housing programs are indicated in Appendix A.

### 2.1 Description of Services / Core Requirements

In consultation with AHA, the qualified firm will be responsible for the coordination of a fully completed Comprehensive Resident Assessment and other related services with the following core requirements:

- Methodology, Design, Project Plan
- Data Collection and Management
- Statistical Analysis and Reporting

The summary below provides general descriptions of what should be performed in each area. The qualified firm is not limited to these descriptions.

#### 1. Methodology, Design, and Project Plan

- The qualified firm shall develop a written plan that details the methodology and design for the Comprehensive Resident Assessment. The methodology should include qualitative and quantitative data collection methods and clearly outline what indicators or variables will be measured. The design should include residents' participation in the data collection and analysis, to the extent feasible within ethical guidelines established by the American Evaluation Association.
- The project should utilize culturally competent evaluation techniques using a strengths-based approach including robust technological data collection instruments and tools, and innovative engagement approaches to increase residents' participation in the assessment. The design should explain how the outcomes or findings will be illustrated or presented, including format-type.



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- The design shall consider baseline data for residents 13 years of age and older, including all AHA-assisted households, regardless of housing program type, whether composed of families, the elderly, or persons with disabilities. The firm will secure all consent and permission forms needed to complete its work directly from the families engaged during the Comprehensive Resident Assessment if related to the Services.
- The project plan shall address how the firm will provide accommodations for residents who have disabilities, speak foreign languages, and have challenges with technical and literacy, while ensuring that residents are not stigmatized.
- The Firm shall provide administrative and management capacity to conduct a Comprehensive Resident Assessment that may include online, face-to-face, and telephone surveys, focus groups and interviews. Prior to launching the Comprehensive Resident Assessment, the firm shall include in its design the agreed-upon sample size for the Comprehensive Resident Assessment as indicated in Appendix A, including the number of small focus groups designed to provide feedback on survey instruments and/or validate findings with respect to AHA's Resident Demographics.
- The methodology, design, consent and permission forms shall be shared with and agreed upon by AHA prior to implementation of the Comprehensive Resident Assessment.

### 2. Data Collection Instrument and Management

- The firm shall develop a data collection plan including the methods, procedures, and instruments used to collect data for the Comprehensive Resident Assessment.
- Methods of data collection may involve a combination of qualitative and quantitative data. However, the firm will provide a logical data collection plan and provide rationale for the types of qualitative and quantitative methods used to implement the Comprehensive Resident Assessment.
- To ensure integrity of data, the firm shall maintain all information in a secure data management system environment covered by a confidentiality agreement. Proposals should discuss how the firm plans to protect the data collected from unauthorized physical and electronic access.

### 3. Statistical Analysis Reporting

- The firm shall provide an analysis and summary of findings related to the Comprehensive Resident Assessment; both quantitative and qualitative information must be analyzed and summarized in an understandable manner. The firm should provide an analysis that elucidates trends across AHA housing program types. Any statistical modeling such as regression analysis must be interpreted in a readable format supplemented with all statistical tables supporting analyses output.
- The final report should draw upon information, findings and recommendations from AHA's FY 2018 Moving to Work Annual Plan, which includes AHA's 5-Year Strategic Plan, Vision 2022. The recommendations must provide adequate justification of areas and ways to



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facilitate opportunities to improve PPI's human development programs, services, activities, and related goals.

### 2.2 Specific Deliverables – Comprehensive Resident Assessment and Other Related Services

The qualified firm shall be responsible for meeting predetermined deliverables as required by AHA, conduct a Comprehensive Resident Assessment and perform other related research services to satisfy all contract deliverable requirements, provide all professional research and evaluation services to include but not limited to the following:

#### 1. Methodology and Data Collection Instruments

The Comprehensive Resident Assessment shall be a tool for AHA to gather information on residents' assets, interests, and needs. The qualified firm shall provide a written plan detailing the methodological approach and data collection plan for implementing the Comprehensive Resident Assessment. Instruments used to collect data, should provide an analysis of dimensions including but not limited to:

- a. Educational Level
- b. Employment Stability
- c. Career Goals, Resiliency and Training
- d. Technological Adeptness, Access, and Interests
- e. Physical Health & Wellness (7 essentials of whole-person wellness)
- f. Parental Engagement & Obligations
- g. Child and Youth Development Engagement
- h. Social and Community-based Supportive Systems
- i. Community Involvement (social organizations, volunteerism, etc.)
- j. Basic Needs (clothing, childcare, transportation, food, etc.)
- k. Life Skills (household management, human relations, budget and assets development, setting goals, etc.)
- l. Daytime Interests (hobbies, special skills, etc.)
- m. Utilization of AHA Programs and Services
- n. Population trends

Rights in Data (Ownership and Proprietary Interest) – AHA shall have exclusive ownership of, all proprietary interest in, and the right to full and exclusive possession of all information, materials and documents discovered or produced by a Selected Contractor pursuant to the terms of an AHA Contract with the Selected Contractor, including but not limited to reports, memoranda or letters concerning the research and reporting tasks of this contract. AHA is seeking responses in answer to this published scope of work that incorporate the delivery of tools that gather salient resident data about AHA resident needs, assets and resources available. The selected awardee is intended to utilize the compiled data to publish reports to the AHA, towards the end of the engagement, to represent a benchmark. AHA intends to utilize the tools thereafter, over an indefinite period of time, to develop and evaluate various service delivery programs and methodologies to improve resident quality of life and self-sufficiency goals. AHA does not prohibit but strongly discourages proposals that incorporate data collection tools that contemplate ongoing licensing fees for any term of use. To the extent that proprietary, trade secret, patent, copyright or any protected intellectually property must be used Respondents should anticipate incorporating perpetual licenses to AHA AHA will use the data collection tools to refresh the conclusion from this surveying initiative to



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measure progress of new programs to AHA residents over time. AHA will not utilize any information for commercial purposes.

### 2. Series of Reports and Results

AHA's designation as a HUD MTW Demonstration Program agency is a major component of AHA's business plan. AHA's business model has positioned it to achieve three goals of "Quality Living Environments, Self-Sufficiency, and Economic Viability" - and supported by AHA's vision of healthy mixed-income communities and healthy self-sufficient families. Self-sufficiency aims to: (a) facilitate opportunities for families and individuals to build economic capacity and stability that will reduce their dependency on subsidy and help them, ultimately, to become financially independent; (b) facilitate and support initiatives and strategies to support great educational outcomes for children; and (c) facilitate and support initiatives that enable the elderly and persons with disabilities to live independently with enhanced opportunities for aging well.

The results of this Comprehensive Resident Assessment will provide important information with respect to AHA's MTW Business Plan and related goals and activities. The deliverables will include the issuance of preliminary and subsequent results and reports in March 2018, April 2018, May 2018, and June 2018.

### 3. Program Recommendations

The core purpose for the Comprehensive Resident Assessment is understanding residents' capacity, assets, interests, and needs. The assessment also intends to assess residents' awareness, utilization, and participation in PPI programs and services – see Appendix B & C. Data collection instruments should examine underlying causes and explanations for programmatic challenges regarding residents' engagement and participation in existing programs. Based on the findings, the qualified firm should provide recommendations to inform opportunities for redesigning, expanding or establishing new programs.

- **Comprehensive Resident Assessment Deliverable and Timeline**

In consultation with AHA, the qualified firm will provide regular updates and interim Deliverables, as identified in the project proposal and plan. The firm will also be responsible for submitting drafts and Deliverables according to the schedule below. A detailed description of the Scope of Work and Deliverables is in Appendix D. The qualified firm shall propose the Fee Scale and Rate.

Deliverables	Due Dates
Methodology and Project Plan	March 15, 2018
AHA Review and Provide Feedback	March 15, 2018
Implementation of Assessment	March – May 2018
Progress Report and Preliminary Findings	April 30, 2018
Progress Report and Preliminary Findings	May 30, 2018
Final Report and Presentation	June 30, 2018

#### 3.1 Evaluation Factors

The quote evaluation process is designed to award the contract, not necessarily to the Respondent of least cost, but rather to the Respondent with the best combination of attributes (e.g., qualifications and experience, cost), based upon the evaluation factors specifically established for this RFQ.



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Respondents must provide all information outlined in the Evaluation Factors to be considered responsive. Quotes will be evaluated based on the responsiveness of the Respondent’s information to the Evaluation Factors, which will demonstrate the Respondent’s understanding of the Evaluation Factors and capacity to perform the required services of this Request for Quotes.

Quotes will be evaluated based on the following Evaluation Factors:

Evaluation Factors	Maximum Points
<b>Methodology &amp; Project Plan (A)</b>	<b>60</b>
<b>Qualifications and Experience (B)</b>	<b>35</b>
<b>Commitment to Diversity (D)</b>	<b>5</b>
<b>Total</b>	<b>100</b>

### Evaluation Factor Description

The maximum points that shall be awarded for each of the Evaluation Factors are detailed and described below.

#### Evaluation Factor A

Methodology & Project Plan – *(Eight page maximum)*.....60 Points

Explain your proposed methods and plan in conducting the Comprehensive Resident Assessment. Demonstrate evidence of Respondent’s ability and a strategy to develop a comprehensive project plan from inception to completion.

1. Explain in detail your methodologies to conduct the Comprehensive Resident Assessment? What is the rationale for using these methodologies? **(20 Points)**
2. Explain in detail your approach for data collection, management, and analysis, operationalization of variables/indicators, and addressing ethical and privacy concerns? **(10 Points)**
3. Explain in detail your strategy to address social barriers such as disability and language differences? **(10 Points)**
4. Explain the training (type, frequency, method, levels, etc.) that will be provided to staff prior to conducting the Comprehensive Resident Assessment with special emphasis on survey instruments and focus group administration? **(10 Points)**
5. Describe how you will mutually engage with designated AHA staff in conducting the Comprehensive Resident Assessment? **(10 Points)**

#### Evaluation Factor B

Qualifications and Experience – *(Three page maximum)*.....35 Points

Demonstrate capacity by identifying the number of full-time and part-time staff that will be made available to fulfill the requirements of this RFP. Provide detailed information on the firm’s qualifications and appropriate certifications and/or licenses. Provide information associated with staff qualifications, including but not limited to resumes; organizational chart, with respect to conducting professional research studies and other related services.



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Provide the firm’s detailed direct experience in conducting needs assessments and evaluations related to research, surveys, use of statistical software/tools and type of audience, which can be documented through the references and work experience provided.

At a minimum, the successful firm or organization should outline the following information:

1. History of at least three years and preferably five years of conducting needs assessments or evaluations to identify, assess, and predict program services, activities, and related goals; provide a minimum of three (3) current and/or former (for the purpose of this RFP, former is defined as within the past two years) clients that your firm has provided these services and include the client name, point of contact, telephone number and e-mail address **(15 Points)**
  
2. History of at least five years of experience in survey design and administration, data collection, and statistical analysis and reporting; provide a minimum of three (3) current and/or former (for the purpose of this RFP, former is defined as within the past two years) clients that your firm has provided these services and include the client name, point of contact, telephone number and e-mail address **(10 Points)**
  
3. Staff with experience in utilizing culturally competent evaluation techniques using a strengths-based approach related to research and providing sound outcomes, recommendations and conclusions **(10 Points)**

### Evaluation Factor C

Fee Proposal – *(Four page maximum)*.....20 Points

Basis of Award - Price will be evaluated but not weighed. AHA will award a contract(s) to the Respondent(s) who’s proposal offers the best overall value to AHA considering price and the scores derived from the review of technical evaluation factors.

### Evaluation Factor D

Contracting/Employment Opportunity Plan – *(Three page maximum)*.....5 Points

AHA shall, to the greatest extent feasible, make every effort to ensure that small businesses, minority owned and women-owned businesses, and labor surplus area businesses, and other individuals or firms located in or owned in substantial part by persons residing in the area of AHA-owned communities are used when possible in AHA’s contracting opportunities.

Respondent is encouraged to provide a contracting/employment opportunity plan, noting the potential jobs and subcontracting opportunities that will be made available by Respondent for the services to be provided.

**MAXIMUM TOTAL POSSIBLE POINTS.....100 Points**

#### 4.1 Contract Period

The contract term will be for eight (8) months. AHA reserves the right to terminate the contract at any time.



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### 4.2 Clean Hands Policy

For this RFQ, respondents should have a one-year cooling off period before advising an AHA development partner, unless respondent is granted a waiver by AHA President and CEO.

Procurement actions shall be conducted only with responsible Respondents who have the technical and financial competence to perform, who have the fiscal responsibility in business dealings, and who have a satisfactory record of integrity. Before awarding a contract, AHA shall review the proposed Respondent's ability to perform the contract successfully, considering factors such as the Respondent's integrity, compliance with public policy, record of past performance on AHA and other jobs (including contacting previous clients of the respondent), and financial and technical resources. AHA shall not award a new contract or conduct new business with a bidding respondent, vendor or applicant who (i) has past due financial obligations or indebtedness to AHA pursuant to a contract or other transaction and has not fulfilled the obligation prior to submission of a bid, proposal or application for a contract, (ii) has an existing claim, demand, litigation action, investigation, hearing, or other legal, administrative, arbitral or similar proceeding or dispute against AHA, whether civil or criminal (including any appeal or review of any of the foregoing) or (iii) in AHA's reasonable discretion, has taken action that may give rise to or threatened to assert a claim, demand, litigation action, investigation, hearing, or other legal, administrative, arbitral or similar proceeding or dispute against AHA, whether civil or criminal (including any appeal or review of any of the foregoing) or other dispute against AHA. The President and Chief Executive Officer may waive the requirements of this paragraph for good cause shown as determined by the President and Chief Executive Officer and if it is otherwise in AHA's best interests.

### 5.1 Insurance

Respondent will be required to obtain and maintain the following insurance coverages during the entire contract period:

#### A. Minimum Limits and Coverage

- I. Worker's Compensation and Employer's Liability with the following minimum limits and coverage:
  - a. Workers Compensation- Statutory Limit in accordance with the laws of the State of Georgia
  - b. Employer's Liability:
    - \$500,000 bodily injury for each accident
    - \$500,000 bodily injury by disease for each employee
    - \$500,000 bodily injury disease aggregate
- II. Commercial General Liability with the following minimum limits and coverage:
  - a. \$1,000,000 combined single limit for each occurrence for bodily injury/property damage
  - b. AHA must be listed as an additional insured
- III. Automobile Liability with the following minimum limit and coverage:
  - a. \$1,000,000 combined single limit each accident.
  - b. Coverage shall be for any auto (including owned, hired, and non-owned autos)





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- c. AHA must be listed as an additional insured
- IV. Professional Liability / Errors & Omissions (if required)
- a. Professional Liability / Errors & Omissions insurance in the amount of not less than \$1,000,000 per claim, unless otherwise required by AHA.

**Respondent shall provide certificates of insurance to AHA prior to execution of the contract and at the beginning of each option term.**

### **B. Additional Requirements**

AHA reserves the right to require the Respondent to provide certified copies of such policy or policies. Each such policy will not be canceled or materially changed or altered without first giving 30 days' written notice thereof to AHA's Vice President, Acquisition & Management Services, 230 John Wesley Dobbs Avenue, NE, 5<sup>th</sup> Floor, Atlanta, Georgia 30303-2421, sent by certified mail, return receipt requested.

Certificate(s) of Insurance shall be provided to AHA evidencing that all coverage, limits and endorsements required herein are maintained and in full force. AHA shall be listed on the Certificate as an additional insured as noted in the above coverage requirements.

The insurance carrier shall be licensed to transact business in the State of Georgia and shall carry a current A.M. Best's rating of no less than B+ VI.

Respondent agrees, and hereby authorizes its insurer, to notify AHA of any substantial change in such insurance coverage described herein. Substantial change includes, but is not limited to, events such as cancellation, non-renewal, reduction in coverage, or receipt of a claim against such coverage with a potential recovery in excess of 20% of available coverage.

The premium cost of all insurance purchased by the Respondent for protection against risks assumed by virtue of the contract shall be borne by the Respondent and is not reimbursable by AHA.

AHA reserves the right, but not the obligation, to review and revise any insurance requirements, including limits, coverages and endorsements, based upon insurance market conditions affecting the availability and affordability of coverage. Additionally, AHA reserves the right, but not the obligation, to review and reject any insurance policies, certificates of insurance or insurer failing to meet the criteria stated herein.

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<sup>i</sup> Atlanta Housing Authority (2016) FY 2017 MTW Annual Plan. Retrieved from [https://www.atlantahousing.org/cms/uploads/file/aha-fy-2017-mtw-annual-plan\\_boardapproved\\_final-2016-0412small-pdf.pdf](https://www.atlantahousing.org/cms/uploads/file/aha-fy-2017-mtw-annual-plan_boardapproved_final-2016-0412small-pdf.pdf)

<sup>ii</sup> Atlanta Housing Authority (2017). Vision 2022: Live. Work. Thrive: A 5-Year Plan. Retrieved from [https://www.atlantahousing.org/cms/uploads/file/Vision2022\\_3.23.17.pdf](https://www.atlantahousing.org/cms/uploads/file/Vision2022_3.23.17.pdf)