



**QUOTATIONS FOR SMALL PURCHASE (QSP)
No. 2018-11UAS**

UTILITY ALLOWANCE STUDY

QSP Document

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INTRODUCTION

The Daytona Beach Housing Authority (hereinafter, "DBHA") is a public entity that was formed to provide Federally-subsidized housing and housing assistance to low-income families within the Daytona Beach area. DBHA is headed by a CEO/Executive Director and is governed by a seven-person Board of Commissioners and is subject to the requirements of Title 24 of the Code of Federal Regulations (hereinafter , "CFR") and DBHA 's procurement policy.

Currently, the HACDB is responsible for the management of 1,337 Housing Choice Vouchers and 635 Public Housing units which is divided into two (2) AMPs. In addition, HACDB is the co-general partner of four (4) Low Income Housing Tax Credit developments with 390 units of which 144 are ACC units. HACDB also has two (2) Instrumentalities in which it engages in the development of affordable housing and providing social service programs within the community it serves.

In keeping with its mandate to provide efficient and effective services, DBHA is now soliciting proposals from qualified, vendors to provide a **Utility Allowance Study**. All proposals submitted in response to this solicitation must conform to all of the requirements and specifications outlined within this document and any designated attachments and addenda in their entirety.

QSP INFORMATION AT A GLANCE

CONTACT PERSON (NOTE: Unless otherwise specified, any reference herein to “Contracting Officer” or “(CO)” shall be a reference to Ms. Bates.)	Procurement Department Telephone (386) 253-5653 E-mail:procurement@dbhafl.org
HOW TO OBTAIN THE QSP DOCUMENTS ON THE APPLICABLE INTERNET SITE	www.dbhafl.org
Walk through facility	N/A
DEADLINE TO SUBMIT QUESTIONS	Nov 22 , 2018 3:00 pm EST
HOW TO FULLY RESPOND TO THIS QSP BY SUBMITTING A QUOTE SUBMITTAL	<ol style="list-style-type: none"> 1. As directed within Section 3.2.1 of the QSP document, enter proposed pricing 2. If a Section 3 Business Preference is being claimed, submit 1 copy of such documentation to the Agency Administrative Office.
QUOTE SUBMITAL RETURN & DEADLINE	<p>*DEC 7, 2018 3:00 PM EST 211 N Ridgewood Ave Suite 300, Daytona Beach, FL 32114 Proposal must be received in-hand and time-stamped by the Agency by no later than 3:00 p.m. EST on this date).</p>

1.0 THE AGENCY’S RESERVATION OF RIGHTS. The Agency reserves the right to:

- 1.1 **Right to Reject, Waive, or Terminate the QSP.** Reject any or all quotes, to waive any informality in the QSP process, or to terminate the QSP process at any time, if deemed by the Agency to be in its best interests.
- 1.2 **Right to Not Award.** Not award a contract pursuant to this QSP.
- 1.3 **Right to Terminate.** Terminate a contract awarded pursuant to this QSP, at any time for its convenience upon 10 days written notice to the Contractor(s).
- 1.4 **Right to Determine Time and Location.** Determine the days, hours and locations that the successful quoter (hereinafter, “Contractor”) shall provide the services called for in this QSP.
- 1.5 **Right to Retain Quotes.** Retain all quotes submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving quotes without the written consent of the Agency Contracting Officer (CO).
- 1.6 **Right to Negotiate.** Negotiate the fees proposed by the quoter entity.
- 1.7 **Right to Reject Any Quote.** Reject and not consider any quote that does not meet the requirements of this QSP, including but not necessarily limited to incomplete quotes and/or quotes offering alternate or non-requested services.
- 1.8 **No Obligation to Compensate.** Have no obligation to compensate any quoter for any costs incurred in responding to this QSP.

- 1.9 Right to Prohibit.** At any time during the QSP or contract process, prohibit any further participation by a quoter or reject any quote submitted that does not conform to any of the requirements detailed herein. By accessing the nahro.economicengine.com Internet System (hereinafter, the “noted Internet System” or the “System”) and by downloading this document, each prospective quoter is thereby agreeing to abide by all terms and conditions listed within this document and within the noted Internet System, and further agrees that he/she will inform the CO in writing within 5 days of the discovery of any item listed herein or of any item that is issued thereafter by the Agency that he/she feels needs to be addressed. Failure to abide by this time frame shall relieve the Agency, but not the prospective quoter, of any responsibility pertaining to such issue.
- 1.10 Right to Reject - Obtaining Competitive Solicitation Documents.** The nahro.economicengine.com Internet-based software is the only official and appropriate venue to obtain the competitive solicitation documents (and any other information pertaining to the competitive solicitation such as addenda). Accordingly, by submitting a response to this competitive solicitation the respondent thereby affirms that he/she obtained all information on the noted software. Any other group such as a bid depository that informs potential respondents of the availability of such competitive solicitations are hereby instructed to not distribute these documents to any such potential respondents, but to instruct the potential respondents to visit the noted Internet-based software to obtain the documents. The Agency will reject without consideration any response submitted from a firm that has not obtained the documents from the noted Internet-based software.

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2.1 Service Location: These services are applicable at the following sites:

Affordable Housing/ Tax Credit/ HCV

LIHTC			PUBLIC HOUSING			HCV PROGRAM		
Proj No	Name	Units	Proj No	Name	Units	Proj No	Name	Units
7-17	Villages of Halifax	71	7-6	Palmetto Park I	30	N/A	VASH	218
7-18	Lakeside	103	7-7	Palmetto Park II	100		Vouchers	1119
7-19	Pine Haven	136	7-10	Caroline	100			
	Halifax I (13 UNITS)	13	7-15	Northwood/Walnut	77			
	Halifax II (80 UNITS)	80	7-20	Northwood II	28			
403			635			1337		

All locations are located in Daytona Beach, FL. DBHA takes **NO** responsibility for the data needed and not included in the specifications as required for the submission of a realistic QSP.

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2.2 SCOPE OF WORK/TECHNICAL SPECIFICATIONS. The Agency is seeking quotes from qualified, licensed and insured entities to provide the following detailed services listed herein:

Complete a Utility Allowance Study in accordance with 24 CFR Part 965 for the following Affordable Housing / Tax Credit/ HCV units.

LIHTC			PUBLIC HOUSING			HCV PROGRAM		
Proj No	Name	Units	Proj No	Name	Units	Proj No	Name	Units
7-17	Villages of Halifax	71	7-6	Palmetto Park I	30	N/A	VASH	218
7-18	Lakeside	103	7-7	Palmetto Park II	100		Vouchers	1119
7-19	Pine Haven	136	7-10	Caroline	100			
	Halifax I (13 UNITS)	13	7-15	Northwood/Walnut	77			
	Halifax II (80 UNITS)	80	7-20	Northwood II	28			
403			335			1337		

POINT OF CONTACTS

WATER	ELECTRIC	GAS
The City of Daytona Beach P.O. Box 2455 Daytona Beach, FL 32115 (386) 671-8100 www.codb.us	Florida Power & Light (800) 375-2434 www.fpl.com	TECO Peoples Gas P.O Box 31318 Tampa, FL 33631-3318 (866) 832-6249 www.peoplesgas.com

UTILITY ALLOWANCE STUDY

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LIHTC			PUBLIC HOUSING		
Proj No	Name	Utility	Proj No	Name	Utility
7-17	Villages of Halifax	E	7-6	Palmetto Park I	E,W,G
7-18	Lakeside	E	7-7	Palmetto Park II	E,W,G
7-19	Pine Haven	E	7-10	Caroline	E,W,G
	Halifax I (13 UNITS)	E	7-15	Northwood/Walnut	E,W,G
	Halifax II (80 UNITS)	E	7-20	Northwood II	E,W

Note identified utilities paid by resident.

E= ELECTRIC

W=WATER

G=GAS

UTILITY ALLOWANCE STUDY

PROJECT NUMBER	NAME	YEAR BUILT	TOTAL UNITS	0-BR	1BR	2BR	3BR	4BR
FL-7-6/7-7	Palmeto Park	1959/1960	130	0	0	74	36	20
FLL 7-10	Caroline Village	1965	100	0	0	55	45	0
FL-7-15	Northwood /Walnut	1985	77	0	20	38	19	0
FL 7-20	Northwood /Walnut	2015	28	0	0	12	16	0

3.0 QUOTE FORMAT.

3.1 SECTION 3 If a quoter wishes to claim a Section 3 business preference (please see Documents 3.0 and 3.1 attached hereto), he/she must submit a fully completed Document 3.0 along with the additional documentation detailed therein.

3.2 Entry of Proposed Fees. The proposed fees shall be submitted by the quoter and received by the Agency. Unless otherwise stated, the proposed fees are all- inclusive of any related costs that the Contractor will incur to provide the noted services, including, but not limited to: employee wages and benefits; clerical support; overhead; profit; licensing; insurance; materials; supplies; tools; equipment not specifically agreed to by the Agency; etc.

3.3 Additional Information Pertaining to the above Pricing Items.

3.3.1 Quantities. All quantities entered by the Agency herein are for calculating purposes only. As may be further detailed herein, the Agency does not guarantee any minimum or maximum amount of work as a result of any award ensuing from this QSP, as the Agency anticipates that the ensuing contract will be a Requirements Contract, in which case the Agency shall retain one contractor only and shall retain the right to order from that contractor (successful quoter), on a task order basis, any amount of services the Agency requires.

3.3.2 Submission Conditions/Responsibilities. By accessing the noted Internet System, registering and downloading these documents, each prospective quoter that does so is thereby agreeing to confirm all notices that the Agency delivers to him/her as instructed, and by submitting a quote, the quoter is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this QSP. It shall be the responsibility of each quoter to be aware of and to abide by all dates, times, conditions, requirements and specifications set forth within all applicable documents issued by the Agency, including the QSP document, the documents listed within the following Section 3.6 within Table No. 4 herein, and any addenda and required attachments submitted by the quoter. Written notice from the quoter not authorized in writing by the CO to exclude any of the Agency requirements contained within the documents may cause that quoter to not be considered for award.

3.4 Quoter’s Responsibilities – Contact with the Agency. It is the responsibility of the quoter to address all communication and correspondence pertaining to this QSP process only to the CO identified within Table No. 2 on page 4 herein. Quoters must not make inquiry or communicate with any other Agency staff member or official (including members of the Board of Commissioners) pertaining to this QSP. Failure to abide by this requirement may be cause for the Agency to not consider a quote submittal received from any quoter who has not abided by this directive.

3.4.1 Addendums. All questions and requests for information must be addressed in writing to the CO. The CO will respond to all such inquiries in writing by addendum to all prospective quoters (i.e. firms or individuals that have obtained the QSP Documents). During the QSP solicitation process, the CO will NOT conduct any *ex parte* (a substantive conversation—“substantive” meaning, when decisions pertaining to the QSP are made—between the Agency and a prospective quoter when other prospective quoters are not present) conversations that may give one prospective quoter an advantage over other prospective quoters. This does not mean that prospective quoters may not call the CO—it simply means that, other than making replies to direct the prospective quoter where his/her answer has already been issued within the solicitation documents, the CO may not respond to the prospective quoter’s inquiries but will direct him/her to submit such inquiry in writing so that the CO may more fairly respond to all prospective quoters in writing by addendum.

3.5 Quoter’s Responsibilities — Equal Employment Opportunity and Supplier Diversity. Both the Contractor and the Agency have, pursuant to HUD regulation, certain responsibilities pertaining to the hiring and retention of personnel and subcontractors.

3.5.1 Within our **Agency Procurement Policy** it states that our Agency will:

3.5.1.1 Assistance to Small and Other Business, Required Efforts:

- 3.5.1.1.1** Including such firms, when qualified, on solicitation mailing lists;
- 3.5.1.1.2** Encouraging their participation through direct solicitation of quotes or quotes whenever they are potential sources;
- 3.5.1.1.3** Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by such firms;
- 3.5.1.1.4** Establishing delivery schedules, where the requirement permits, which encourage participation by such firms;

- 3.5.1.1.5 Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Commerce;
- 3.5.1.1.6 Including in contracts, to the greatest extent feasible, a clause requiring contractors, to provide opportunities for training and employment for lower income residents of the project area and to award subcontracts for work in connection with the project to business concerns which provide opportunities to low income residents, as described in 24 CFR Part 135 (so-called Section 3 businesses); and
- 3.5.1.1.7 Requiring prime contractors, when subcontracting is anticipated, to take the positive steps listed above.

4.0 QUOTE EVALUATION.

4.1 No Public Opening. After the quote submittal deadline all quotes received will be evaluated in private for responsiveness (e.g. meets the minimum of the requirements) and responsibility (e.g. a firm that is qualified, responsible and able to provide to the Agency the required services). Firms not meeting the minimum that are deemed to be non-responsive will be notified of such in writing by the Agency in a timely manner (in any case, in no less than 5 days after such determination is made). The Agency reserves the right to, as determined by the Agency, “waive informalities and minor irregularities” in the offers received. Quotes received will be available for inspection by the public after the award has been completed.

4.1.1 Ties. In the case of quotes, the award shall be decided by “drawing lots or other random means of selection.”

4.2 Responsive Evaluation. The Agency will evaluate each quote submitted as to responsiveness (e.g. meets the minimum of the requirements and follows protocol for quote). If the Agency ascertains that such firm has met and followed the proper protocol for this quotation, the Agency may proceed with award as detailed herein. If the Agency determines that such firm is deemed to be not responsive, such firm will be notified of such in writing by the Agency in a timely manner (in any case, in no less than 5 days after such determination is made); in such case the Agency may proceed with the noted Responsive and Responsible Evaluations with the next lowest quoter.

4.3 Responsible Evaluation. The Agency will evaluate each quote submitted as to responsibility (e.g. qualified, responsible, and able to provide the required services). If the Agency ascertains that such firm has the required ability, capability, experience, knowledge, licensing, insurance and resources to provide the required services, the Agency may proceed with award as detailed herein. If the Agency determines that such firm is deemed to be not responsible, such firm will be notified of such in writing by the Agency in a timely manner (in any case, in no less than 5 days after such determination is made); in such case the Agency may proceed with the noted Responsive and Responsible Evaluations with the next lowest quoter.

4.4 Restrictions. Any and all persons having ownership interest in a quoter entity or familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a quoter entity will be excluded from participation in the evaluation of the quote.

5.0 CONTRACT AWARD.

5.1 Contract Conditions. The following provisions are considered mandatory conditions of any contract award made by the Agency pursuant to this QSP:

5.1.1 Contract Form. The DBHA will not execute a contract on the successful quoter's form--contracts will only be executed on the DBHA form and by submitting a quote the successful quoter agrees to do so (please note that the DBHA reserves the right to amend this form as the DBHA deems necessary). However, the DBHA will during the QSP process (prior to the submittal deadline) consider any contract clauses that the quoter wishes to include therein and submits in writing a request for the DBHA to do so; but the failure of the DBHA to include such clauses does not give the successful quoter the right to refuse to execute the DBHA's contract form.

It is the responsibility of each prospective quoter to notify the DBHA, in writing, prior to submitting a quote, of any contract clause that he/she is not willing to include in the final executed contract and abide by.

The DBHA will consider and respond to such written correspondence, and if

the prospective quoter is not willing to abide by the DBHA's response (decision), then the prospective quoter shall be deemed ineligible to submit a quote.

5.1.2 Assignment of Personnel. The DBHA shall retain the right to demand and receive a change in personnel assigned to the work if the DBHA believes that such change is in the best interest of the DBHA and the completion of the contracted work.

5.1.3 Unauthorized Sub-Contracting Prohibited. The Contractor shall not assign any right, nor delegate any duty for the work proposed pursuant to this QSP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CO. Any purported assignment of interest or delegation of duty, without the prior written consent of the CO shall be void and may result in the cancellation of the contract with the Agency, or may result in the full or partial forfeiture of funds paid to the Contractor as a result of the proposed contract; either as determined by the CO.

5.2 Contract Period: The DBHA anticipates that it will initially award a contract for the period of one (1) year with the option, at the DBHA's discretion, for four (4) one-year renewals as allowed by HUD, for a maximum period of five(5) years. A detailed written report is to be submitted of any/all findings.

5.3 Licensing and Insurance Requirements. Prior to award (but not as a part of the quote submission) the Contractor will be required to provide:

5.3.1 Workers Compensation Insurance. An original certificate evidencing the quoter's current industrial (worker's compensation) insurance carrier and coverage amount;

5.3.2 General Liability Insurance. An original certificate evidencing General Liability coverage, naming the Agency as an additional insured, together with the appropriate endorsement to said policy reflecting the addition of the Agency as an additional insured under said policy (minimum of \$1,000,000 each occurrence, general aggregate minimum limit of \$1,000,000, together with damage to premises and fire damage of \$50,000 and medical expenses any one person of \$5,000), with a deductible of not greater than \$5,000;

5.3.3 Automobile Insurance. An original certificate showing the quoter's automobile insurance coverage in a combined single limit of \$1,000,000. For every vehicle utilized during the term of this program, when not owned by the entity, each vehicle must have evidence of automobile insurance coverage with limits of no less than \$100,000/\$300,000 and medical pay of \$5,000.

5.3.4 City/County/State Business License. If applicable, a copy of the quoter's business license allowing that entity to provide such services within the City of Decatur, GA, DeKalb County, and/or the State of Georgia.

5.3.5 Profile of Firm Form. The requested related information shall also be entered where provided for on the Profile of Firm Form (DO NOT ATTACH SUBMIT COPIES WITHIN THE QUOTE SUBMITTAL—we will garner the necessary certificates from the Contractor prior to contract execution).

5.4 Right to Negotiate Final Fees. The Agency shall retain the right to negotiate the amount of fees that are paid to the Contractor, meaning the fees proposed by the top rated quoter may, at the Agency's options, be the basis for the beginning of negotiations. Such negotiations shall begin after the Agency has chosen a top-rated quoter. If such negotiations are not, in the opinion of the CO successfully concluded within 5 business days, the Agency shall retain the right to end such negotiations and begin negotiations with the next-rated quoter. The Agency shall also retain the right to negotiate with and make an award to more than one quoter, as long as such negotiation(s) and/or award(s) are addressed in the above manner (i.e. top-rated first, then next-rated following until a successful negotiation is reached).

5.5 Contract Service Standards. All work performed pursuant to this QSP must conform and comply with all applicable local, state and federal codes, statutes, laws and regulations.

Additional Information Pertaining to the above Pricing Items.

Payments

- Payment will be made to the vendor within thirty (30) days upon receiving an approvable monthly invoice.
The invoice shall state the period and services performed and amount. Special services if requested and provided will be billed via a separate invoice and comprise of a detailed description of the service provided and the date it was provided. DBHA shall notify vendor of any adjustments required to be made to an invoice. Invoices should contain an invoice number, remittance address, itemized products and/or services provided and price as quoted.
- Prior to any and all payments made for goods and/or services provided under this contract, the vendor must provide their tax payer identification number or social security number as applicable. This information must be on file with DBHA. Failure to provide this information may result in a delay in payment and/or backup with holdings as required by the Internal Revenue Service.
- DBHA is exempt from all federal, state and local taxes unless otherwise stated in this solicitation. DBHA claims exemption from all sales and/or use taxes under Florida Tax Code. Florida Limited Sales Tax Exemption Certificates will be furnished upon written request to DBHA.