RFP 25-02 Resident Services Partnership for SelfSufficiency Platform October 2025

Butler Metropolitan Housing Authority 4110 Hamilton-Middletown Rd. Hamilton, OH 45011

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Request for Proposal

The Butler Metropolitan Housing Authority (BMHA) will receive proposals for the following services:

Scope of Services: RFP 25-02 Resident Services Partnership for Self-Sufficiency Platform

Closing Time: 2:00 p.m.

Closing Date: November 13, 2025

Where: Butler Metropolitan Housing Authority

Procurement Department

4110 Hamilton-Middletown Road

Hamilton, OH 45011-6218

A contract will be awarded to the lowest priced responsive, responsible proposer who has complied with the conditions of the specifications.

Statements received after the stated time and date will not be considered.

An information packet will be provided upon request or may be obtained at the BMHA Procurement Department located at 4110 Hamilton-Middletown Road, Hamilton, OH 45011-6218. Questions regarding the specifications should be directed to Michelle Graham (513) 868-5238.

BMHA reserves the right to cancel this Request for Proposal (RFP), or to reject, in whole or in part, any and all submissions received in response to this Request for Proposal, upon its determination that such cancellation or rejection is in the best interest of BMHA. BMHA further reserves the right to waive any minor informalities or the failure of any proposer to comply therewith, if it is in the public interest to do so. BMHA will pay no compensation to any proposer for any costs related to preparation or submittal of the qualifications.

The award will be funded by the U.S. Department of Housing and Urban Development (HUD) and administered by BMHA. HUD reserves the right to review and approve the contract documents and the firm selected by the BMHA.

Pursuant to establish BMHA and HUD Affirmative Action and Equal Employment Opportunity goals, all proposers are advised they must satisfy the goal to utilize qualified minority businesses to perform the subcontract work or supply materials and/or equipment for the project and workforce content.

BMHA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon ten (10) days written notice to the successful prosper.

BUTLER METROPOLITAN HOUSING AUTHORITY By; Michelle Graham, Procurement/Budget Assistant

1.0 Instructions to Proposers

Introduction

This Request for Proposal (RFP) identifies the requirements that are considered to be the minimum required by BMHA. This RFP attempts to provide the proposer with sufficient information to fully understand BMHA's requirements and the environment in which the proposal must be developed and operate. Notwithstanding any of the specific details described in this RFP, it will be the obligation of the proposer to provide a service that works in the accomplishment of the requirements identified in this document. To aid the evaluation team in fully understanding each proposal submitted, and to ensure that full awareness is given to each aspect of the proposal, any deviation from the requirements specified in this document must be clearly noted and referenced to the subject area of the RFP.

1.1 Preparation of Proposals

Proposers are expected to examine the statement of work, the proposed contract terms and conditions, and all instructions. Failure to do so will be at the proposer's risk.

Each proposer shall furnish the information required by the solicitation. The proposer shall sign the proposal and print or type its name on the cover sheet and each continuation sheet on which it makes an entry. Erasures or other changes must be initialed by the person signing the proposal. Proposals signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to BMHA.

Proposals for services other than those specified will not be considered.

1.2 Explanation to Prospective Proposers

Any prospective proposer desiring an explanation or interpretation of the solicitation, statement of work, etc. must request it in writing ten (10) days before closing date. Oral explanations or instructions given before the reward of the contract will not be binding. Any information given to a prospective proposer concerning a solicitation will be furnished promptly to all other prospective proposers as an amendment of the solicitation if that information is necessary in submitting proposals or if the lack of it would be prejudicial to any other prospective proposer.

1.3 Questions

All questions shall be submitted in writing (postal mail, fax, or e-mail) and should be addressed to:

Michelle Graham
Procurement/Budget Assistant
4110 Hamilton-Middletown Road
Hamilton, OH 45011
Fax # (513) 896-9381

Email Address: mgraham@butlermetro.org

Questions may be submitted until 12:00 p.m. (noon) eastern time October 30,2025. Answers and responses will be distributed to all prospective proposers after that date.

1.4 Amendments to Solicitation

If the solicitation is amended, then all terms and conditions, which are not modified, remain unchanged. Proposers must acknowledge receipt of any amendments to this solicitation by signing and returning the amendment.

BMHA must receive the acknowledgement by the time specified for receipt of proposals. Failure to acknowledge all amendments may result in rejection of submission.

The Authority will endeavor to provide copies of addenda to all potential proposers to which this Request for Proposal has been mailed, but it will be the responsibility of each proposer to make inquiry as to the existence and content of addenda or amendments, as the same shall become part of this Request for Proposal and all proposers will be bound thereby, whether or not the addenda are actually received by the proposer.

All addenda may be downloaded from www.butlermetro.org, or may be obtained by contacting Procurement/Budget Assistant listed in Section 1.3.

1.5 Proposal Requirements

Proposal forms must be signed by an individual authorized to execute contracts for the Company in order to be accepted. **These forms, required at the time of submission, must be signed and provided to BMHA.** (Forms may be downloaded from www.butlermetro.org, or obtained by contacting Procurement/Budget Assistant in Section 1.3)

- Debarment Certification for Prime and all levels of Sub-Consultants (HUD 2992).
- Instructions to Offerors (HUD-5369-B)
- General Conditions for Non-Construction Contracts (HUD-5370-C).
- A completed Representation Certifications and Other Statements of Bidders Form (HUD-5369-C).
- Declaration regarding material assistance to terrorist organizations (HLS 0038).

- Non-Collusive Affidavit for prime and all levels of Sub-Consultants
- Certificate of Corporate Good Standing for Prime and all levels of Sub-proposers
- Listing of three (3) references with contact information
- List of 5 current clients in similar industry with contact information
- Within ten (10) days of notice of award, the following will be requested:
 - o Proof of the appropriate insurance coverage:
 - Workers' Compensation Statutory Amount
 - \$500,000 Automobile liability on owned, non-owned and hired motor vehicles used in connection with this contract
 - A "Certificate of Insurance" must name the BUTLER METROPOLITAN HOUSING AUTHORITY as "third party insured"
 - General Liability \$500,000

Proof of coverage shall be maintained uninterrupted for the duration of the contract. Failure to maintain coverage shall be considered in default of the contract and will be grounds for the contracting officer to terminate the contract for default.

Workmen's Compensation, in accordance with State Law for all employees engaged under this contract. Proof of Workmen's Compensation coverage shall be maintained uninterrupted for the duration of the contract. Failure to maintain a current valid uninterrupted Workers' Compensation certificate will be ground for the contracting officer to terminate the contract for default.

1.6 Time for Receiving Proposals

Proposals received prior to the closing date and time will be securely kept, unopened. The officer, whose duty it is to open them, will decide when the specified time has arrived. No proposal received after the specific time will be considered. The timestamp machine at the receptionist desk at 4110 Hamilton-Middletown Road Hamilton, OH 45011 will serve as the official time clock.

1.7 Proposal Withdrawal

No proposal shall be withdrawn for a period of Ninety (90) days subsequent to the opening of the proposals without written consent of BMHA.

1.8 Proposal Submission

Proposals must be submitted to BMHA by November 13, 2025 at 2:00pm. (local time) without exception, at the following address to be eligible for consideration:

Butler Metropolitan Housing Authority Procurement Department 4110 Hamilton-Middletown Road Hamilton, OH 45011-6218 One original copy of the proposal, plus three exact copies marked "Copy" are required. The cost proposal should be attached only with "original" proposal.

To assure that your proposal arrives at the proper place, on time, and to prevent opening by unauthorized individuals, your proposal must be identified on the envelope of package as follows:

Request for Proposal To Provide: Resident Services Partnership for Self-Sufficiency Platform Solicitation No. RFP 25-02 Due: 11/13/2025 2:00 p.m.

Proposals shall be submitted in sealed envelopes or packages using forms furnished by BMHA. All required forms shall be submitted in the envelope or package(s), which will clearly be marked "Proposal Documents" and will show the project name and number, name of proposer and the date and time when proposals are due. Once received by

BMHA, proposals will not be returned.

All submissions are the property of the Authority and shall be retained by the Authority. Responses will not be returned. The contents of the documents submitted by the successful proposer(s) may become part of any contract award at the sole discretion of the Authority.

Facsimile proposals, modifications or withdrawals will not be considered.

Negative or zero prices will cause the whole submission to be deemed a non-responsive submission.

BMHA may reject any proposal as non-responsive if it is materially unbalanced as to the prices for the various items of work to be performed. A proposal is materially unbalanced when it is based on prices significantly less than cost for some work and prices which are significantly overstated for other work.

1.9 Late Submissions, Modifications, and Withdrawal of Proposals

Any proposal received at the place designated in the solicitation after the exact time specified for receipt will not be considered.

A modification resulting from BMHA's request for "best and final" proposal received after the time and date specified in the in the request will not be considered unless received before award and the late receipt is due solely to mishandling by BMHA after receipt by BMHA.

The only acceptable evidence to establish the time of receipt at BMHA is the time/date stamp of BMHA on the proposal wrapper or other documentary evidence of receipt maintained by BMHA.

Notwithstanding this provision, a late modification of an otherwise successful proposal that makes its term more favorable to BMHA will be considered at any time it is received and may be accepted.

1.10 Evaluation of Proposals

Within ninety (90) days after receipt of proposals, BMHA will complete a review of all qualifications.

The Procurement Section will conduct an initial review process. This review of all proposals submitted to establish responsiveness and responsibility according to the submission of required documents on the part of the proposer.

Upon establishment of responsiveness, the technical and price evaluation phase would begin. An internal Evaluation Team will be assigned to this project. Their responsibility is to: (1) thoroughly review each proposer's proposal, (2) rate each proposer's proposal by awarding a point value to each of the evaluation and selection criteria.

Each proposer will ultimately end up with a score based upon the points assigned to the evaluation factors by each team member. All individual factors will be added to obtain an accumulated total score. At this point the Authority may decide, at its sole discretion, to enter into negotiations with the highest rated proposer.

Should the Authority deem it advisable to obtain clarification, proposers yielding clearly competitively high scores during the first phase evaluation may then be invited to a technical question and answer conference to be held at a specific time and date scheduled by the Procurement Officer. **Not all proposers may be asked to make such oral presentations**.

During this oral evaluation phase BMHA may, at its discretion, request any one or all proposers to make oral presentations. If invited to participate, at this point, based on their oral presentations, proposers will again be evaluated on the technical evaluation factors.

In consideration of the evaluation team's final scores, BMHA intends to enter into negotiations with, and award a contract to, the highest ranked proposer(s) based on the points received for the **oral evaluation** phase.

The decision as to who shall receive a contract award, or whether or not an award shall be made as a result of this request for proposal shall be at the sole discretion of the Authority. In addition, multiple awards may be made.

1.11 Responsibility of Prospective Proposer

BMHA shall award a contract only to a responsible prospective proposer who is able to perform successfully under the terms and conditions of the proposed contract. To be determined responsible, a prospective proposer must:

- Have adequate financial resources to perform the contract, or the ability to obtain them:
- Have a satisfactory record of integrity and business ethics;
- Have a satisfactory record of compliance with public policy (i.e. Equal Employments Opportunity); and
- Not have been suspended, debarred, or otherwise determined to be ineligible for award of Contracts by the Department of the U.S. Government. Current lists of ineligible proposers are available for inspection.

Before a proposal is considered for award, the proposer may be requested by the BMHA to submit a statement or other documentation regarding any of the foregoing requirements. Failure by the proposer to provide additional information may render the proposer ineligible for award.

1.12 Negotiations with Selected Proposer

Once the evaluation process is complete, BMHA will negotiate with the highest ranked proposer. The negotiations will include clarifying the specific scope of work, performance period, and determining the final cost of the scope of work. If BMHA and the highest ranked proposer fail to reach an agreement, BMHA may negotiate with the next highest ranked proposer to reach an agreement, unless BMHA determines that it is in the best interest to re-solicit for these services.

1.13 Contract Award

The contract(s) will be awarded to the most responsive and responsible firm, which is most advantageous to BMHA provided the proposal complies with all conditions of the Request for Proposal (RFP). BMHA reserves the right to reject any and all proposals and to waive any informality in the solicitation. BMHA is prohibited from making an award to firms (including sub-proposers) or any individuals that are on the list of firms ineligible to receive from the United States Governments, as furnished by HUD.

1.14 Contract Term

The Contract term is for two (2) years, effective January 1, 2026 thru December 31, 2027, with the Authority having the option to renew for three (3) additional one-year periods at no additional cost to the Authority, effective January 1, 2028 thru December 31, 2028, January 1, 2029 thru December 31, 2029, January 1, 2030 thru December 31, 2030.

1.15 Review of Services

90 days prior to the end of the twenty-fourth (24th) month of the initial contract BMHA will evaluate the contractor to determine whether the optional renewal period should be considered. This evaluation will be based on the productivity of the Contractor, as specified by BMHA. The Contractor agrees to provide BMHA with any and all information that BMHA deems necessary and pertaining to the service for evaluation. **OPTIONAL RENEWAL PERIOD(S)**

By mutual consent of BMHA and the Contractor, the contract may be renewed for three (3) additional twelve (12) month periods ending December 31, 2023. This option shall be automatically exercised unless written notice to the contrary is filed with either party not later than 90 days prior to the current contract period expiration date. It is understood and agreed that the contract may be renewed only at the same prices and under the same conditions governing the original contract.

1.16 Service of Protest

Any protest against the award of a contract to this solicitation shall be served on BMHA by obtaining written and dated acknowledgement of receipt from BMHA at the address shown on the cover of this solicitation. Any protest against the solicitation must be received before the due date for the receipt of proposal or proposals, and any protest against the award of a contract must be received within ten (10) calendar days after the award of the contract, or the protest will not be considered. All proposal protests shall be in writing, submitted to the contracting officer, who shall issue a written decision on the matter. The determination of BMHA with regard to such protest or to proceed to award notwithstanding such protest shall be final unless the protestor makes an appeal.

1.17 Notice of Award

All proposers will be notified by mail of BMHA's selection as soon as possible. A successful proposer will be issued a Notice of Award.

1.18 Commencement of Work

The selected firm will be expected to begin work within ten (10) days of receipt of the Notice to Proceed

1.19 Cost of Producing Proposal

The cost of producing proposals is the responsibility of the proposer. BMHA will not reimburse any cost incurred to produce and to respond to this solicitation, to participate in oral presentation or to participate in negotiations with BMHA for any proposal.

1.20 Submission Conditions

Do not fold or make any additional marks, notations or requirements on the documents to be submitted. Proposers are not allowed to change the conditions or specifications contained herein by making or entering onto these documents or the documents submitted any revisions or additional and if any such additional marks, notations or requirements are entered on any of the documents that are submitted to BMHA by the proposer, such may invalidate the proposal. If, after accepting such a proposal, BMHA decides that any such entry has not changed the intent of the proposal that BMHA intended to receive, BMHA may accept the proposal and the proposal shall be considered by BMHA as if those additional marks, notations or requirements were not entered on such.

1.21 Qualifications of Proposers

BMHA may make such reasonable investigations as deemed proper and necessary to determine the ability of the proposer to perform the services and the proposer shall furnish to BMHA all such information and data for this purpose as may be requested. BMHA reserves the right to inspect the proposer's physical facilities prior to award to satisfy questions regarding the proposer's capabilities. BMHA further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such proposers are not properly qualified to carry out the obligations of the contract and to provide the services described therein.

1.22 Public Records

Proposers acknowledge that Butler Metropolitan Housing Authority is a political subdivision of the state of Ohio and is, therefore, required to comply with the Ohio Public Information Act. If a proposal includes proprietary data, trade secrets, or information the proposer wishes to except from public disclosure, then the proposer must specifically label each page containing such data, secrets, or information as follows:

"PRIVILIGED AND CONFIDENTIAL - PROPRIETARY INFORMATION"

To the extent permitted by law, information labeled by the proposer as proprietary will be used by BMHA only for purposes related to or arising out of the (a) evaluation of proposes (b) selection of a proposer pursuant to the RFP process, and (c) negotiation and execution of a contract, if any, with the proposer selected.

Neither a proposal, in its entirety, nor the cost section of a proposal will be considered confidential/proprietary. Any proposal marked as such will be deemed non-responsible and eliminated from further consideration.

1.23 Suspended/Debarred

The Authority will reject the qualifications of any proposer who is suspended and/or debarred by HUD from providing services to public housing authorities and reserves the right to reject the proposal of any proposer who has previously failed to perform any contract properly for the Authority.

1.24 Key Personnel

The key personnel specified by the successful proposal will be considered essential to the work to performed by the successful proposer. Prior to diverting any of the key personnel for any reason, the proposers shall notify the Authority in writing at least thirty (30) days in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the contract. The firm shall not change key personnel or hours to be devoted, before or after contract award, without written permission from the Authority.

1.25 Assignments

Unless otherwise agreed to by BMHA's contracting officer, the proposer shall not assign the contract to any other party.

1.26 Termination

Termination may occur for (but is not limited to) the following reasons:

- Proposer fails to perform any provisions within the contract
- Proposer fails to supply ample skilled workman
- Proposer disregards any laws, ordinances, rules or regulations
- HUD funding to the authority is curtailed or reduced
- The convenience of the Authority

1.27 MBE/FBE/Section 3

The Authority has established a goal of 30% Section 3, 20% Minority Business Enterprise (MBE) and 5% Female Business Enterprise (FBE) for contracts exceeding \$10,000. Please indicate the MBE/FBE/Section 3 percentage for your company on the proposal form.

1.28 Laws to be Observed

Proposer warrants compliance with all Federal, State, and Locals laws, statutes, ordinances, rules and regulations and the orders and decrees of any courts and administrative bodies or offices in any manner affecting the performance of this contract. Fees and/or costs associated with such compliance are the responsibility of the proposer and not payable to the Authority.

1.29 Licensing Requirements

Proposer shall maintain all licenses required by local, state and federal laws.

1.30 Hold Harmless Clause

The proposer will hold BMHA harmless from any and all negligent actions the proposer or their employee/s cause.

1.31 Breach of Contract

Any breach of this contract will result in the Authority withholding payment to the proposer until satisfactory results are obtained.

1.32 Complaints

All complaints concerning unfinished or unsatisfactory work will be forwarded to the proposer by the Authority. If these complaints are not resolved or satisfactory arrangements are not made within forty-eight hours following the receipt of the complaint,

the Authority may, at its options, have the work completed in another manner and the cost of such work be deducted from the payment of the proposer.

1.33 Compensation

The proposer is to submit, at the end of each calendar month, an invoice (with proof of service attached) for all services performed during that month. The Authority will issue payment within 30 days of receipt of invoice

Any additional work, not a part of the specifications, must be approved by the Authority on a separate P.O. in order to receive payment.

1.34 Final Payment

Proposer will furnish any required permits and supply all needed affidavits and lien releases for all labor and materials prior to final payment.

1.35 Resident Council Meeting

Proposer shall attend resident council meetings as requested by BMHA.

1.36 Pre-Proposal Conference

There will not be a pre-bid conference with this RFP.

1.37 Property Damage

Contractor is to take extreme care not to damage or destroy the Authority or resident's property, including but not limited to personal, building and vehicles. Should any damage be determined, the contractor is expected to settle the loss in an expeditious and professional manner.

2.0 Scope of Work

Introduction

BMHA serves approximately 2300 households across its Public Housing and Housing Choice Voucher Program portfolios. BMHA seeks to transform its resident services approach from transactional to holistic and outcomes driven. By leveraging strategic partnerships, available facilities, and program funding, BMHA will provide residents with coordinated, accessible support that leads to measurable improvements in self-sufficiency and quality of life.

The selected vendor is to establish and operate a comprehensive Resident Services Platform. The goal is to deliver integrated, wraparound services that promote resident self-sufficiency, expand pathways to homeownership, and improve economic, health, and educational outcomes for BMHA residents. The platform will leverage BMHA's available commercial and community space to provide coordinated, on-site services.

2.1 Objectives

The Resident Services Platform should provide a comprehensive, integrated menu of programs, including but not limited to:

- Economic Mobility & Self-Sufficiency: Homeownership counseling and credit repair; financial literacy; workforce development and job readiness; career pathway coaching and job placement.
- Health and Wellness: Proactive physical and mental health programming; nutrition education; access to screenings and preventive care.
- Education & Lifelong Learning: GED preparation; continuing education; digital literacy and STEM training; tutoring and youth enrichment.
- Active Living & Community Engagement: Fitness and recreation; resident leadership; civic engagement activities.

2.2 Scope of Services

Selected partner(s) will be expected to:

- Design and operate a coordinated wraparound services platform for BMHA residents.
- Deliver on-site programming using available BMHA commercial and community space.
- Leverage partnerships with local nonprofits, government agencies, schools, health providers, and employers.
- Align programming with HUD initiatives such as Family Self-Sufficiency (FSS) and Resident Opportunities and Self-Sufficiency (ROSS) where applicable.
- Provide regular data tracking, outcome reporting, and continuous improvement strategies.
- Establish a long-term sustainability plan including diversified funding and revenue streams.

2.3 Space Utilization

BMHA has commercial and community spaces available within its portfolio for service delivery. Proposals must describe:

- How these spaces will be programmed and activated;
- Any capital or tenant improvements proposed;
- Staffing, hours of operation, and security considerations; and
- How space use will enhance accessibility and participation.

3.0 Submission Requirements

Proposals must include:

- Executive Summary and Organizational Overview;
- Proposed Service Model and Program Design (including curriculum outlines where applicable);
- Description of Partnerships and Referral Networks (MOUs/letters of support encouraged);
- Staffing Plan and Qualifications;
- Proposed Use of BMHA Facilities (space plan, hours, security);
- Budget and Funding Plan (including leveraged resources and sustainability strategy);
- Outcomes Framework and Evaluation Metrics:
- Evidence of Past Performance (case studies or success data);
- References (minimum of 3).
- Required Forms
 - Non-Collusive Affidavit
 - Debarment Certification for Prime and all levels of Sub-Consultants (HUD 2992)
 - Instructions to Offerors (HUD-5369-B)
 - o General Conditions for Non-Construction Contracts (HUD-5370-C).
 - Representation Certifications and Other Statements of Bidders Form (HUD-5369-C).
 - Declaration regarding material assistance to terrorist organizations (HLS 0038)
 - Certificate of Corporate Good Standing for Prime and all levels of Subproposers

One original copy of the proposal, plus three exact copies marked "Copy" are required. The cost proposal should be attached only with "original" proposal.

4.0 Evaluation Factors

Cost

Proposals received in response to this RFP will be evaluated by BMHA staff. Only those proposals from firms which are complete and responsive to the specification set forth in consideration of this RFP will be selected for future consideration.

The evaluation factors listed below will be used as a mechanism for fairly and thoroughly evaluating the proposals submitted. The Authority will select winning respondent based upon the following evaluation criteria and the Authority's particular needs.

Capacity 25 Points

Qualification 25 Points

Experience 25 Points

MBE/FBE/Section 3 5 Points

- The Authority has established a goal of 30% Section 3, 20% Minority Business Enterprise (MBE) and 5% Female Business Enterprise (FBE) for contracts exceeding \$10,000.
- Section 3 is a provision of the Housing and Urban Development (HUD) Act of 1968 that helps foster local economic development, neighborhood economic improvement, and individual self-sufficiency. The Section 3 program requires that recipients of certain HUD financial assistance, to the greatest extent feasible, provide job training, employment, and contracting opportunities for low- or very-low income residents in connection with projects and activities in their neighborhoods.

	20.0
Total:	100 Points
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20 Points

Exhibit A Proposal Form

Proposal Form

Butler Metropolitan Housing Authority

RFP 25-02 Resident Services Partnership for Self-Sufficiency Platform

Submitted By:		
	Contractor	

Statement of Qualifications

Company Name		Phone	.
Address			
Website/E-Mail:			
Number of Employees			
Specialized Equipment / Quali	fications		
Number of Years in Business _.			
	Reference	es	
Company Name		Contact	
Address			
Phone	_ Email		
Company Name		Contact	
Address			
Phone			
Company Name		Contact	
Address			
Phone	Email		

Current Clients

Company Name		Contact	
Address			
Company Name		Contact	
Address			
Company Name		Contact	
Address			
Company Name		Contact	
Address			
Company Name		Contact	
Address			
Company Name		Contact	
Address			

Please indicate the MBE/FBE/S	Section 3 Percentage for your company
MBE: FBE:	Section 3:
Received Addendum No	(If Applicable)
Signed:	
Title:	
Representing:	
Address:	
Telephone:	
F-Mail·	

Exhibit B Required Forms