



**DEPARTMENT OF PROCUREMENT SERVICES
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION**

Complete this cover form and the **Non-Competitive Procurement Application Worksheet** in detail. Refer to the page entitled **"Instructions for Non-Competitive Procurement Application"** for completing this application in accordance with its policy regarding NCRB. Complete "other" subject area if additional information is needed. Subject areas must be fully completed and responses merely referencing attachments will not be accepted and will be immediately rejected.

Department	Originator Name	Telephone	Date	Signature of Application Author 
OBM	Latoya Vaughn	312-744-4742	03/31/2022	
Contract Liaison	Email Contract Liaison	Telephone		
Jessica Vera	jessica.vera@cityofchicago.org	312-744-3901		

List Name of NCRB Attendees/Department

Latoya Vaughn	Budget
Chloe Belczak	Budget

Request NCRB review be conducted for the product(s) and/or service(s) described herein.

Company: Community Development Experts (CDE)

Contact Person:	Phone:	Email:
Ronald Allen	310-869-6210	ron@cdexperts.net

Project Description: CDE provides technical assistance, training, and support for the U.S. Department of Housing and Urban Development's Grants.

This is a request for:

New Contract

Amendment / Modification

Contract Type

Type of Modification

Blanket Agreement Term: 36 (# of mo)

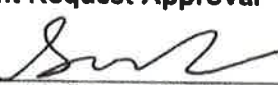

Time Extension **Vendor Limit Increase** **Scope Change**

Standard Agreement

Contract Number: _____


Specification Number: _____

Modification Number: _____

Department Request Approval		Recommended Approval	
	<u>3/31/22</u>		<u>6/8/2022</u>
DEPARTMENT HEAD OR DESIGNEE	DATE	BOARD CHAIRPERSON	DATE
<u>Susie Park</u>		<u>Steven M. Lobsenz</u>	
PRINT NAME		PRINT NAME	

(FOR NCRB USE ONLY)	
Recommend Approval/Date: _____	
Return to Department/Date: _____	
Rejected/Date: _____	

Approved **Rejected**

	<u>6/8/2022</u>
CHIEF PROCUREMENT OFFICER	DATE



DEPARTMENT OF PROCUREMENT SERVICES
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET

All applicable information on this worksheet must be addressed using each question found on the "Instructions for Non-Competitive Procurement Application" in this application.

Justification for Non-Competitive Procurement Worksheet

PROCUREMENT HISTORY

1. Since 2006, CDE has provided technical assistance, training, and support for all of the City's grants funded through the US Department of Housing and Urban Development's. CDE is unique because they have performed IDIS training and other services directly for HUD and some of HUD's grantees who also use IDIS. CDE also has historic knowledge on the City's special formula and capacity limits from HUD and provides critical insight and expertise in navigating the federal and City requirements. This requires the use of the federal government's Integrated Disbursement and Information System (IDIS) system, which is an online reporting system used to manage activity accomplishment data and financial drawdown and reimbursements, Sage HMIS Reporting Repository (Sage), well as the Disaster Recovery Grants Reporting Systems (DRGR) system. CDE has extensive insurance providing training and technical assistance on all HUD rules, regulations, and cross cutting program requirements of HUD-funded programs. The City intends on competitively bidding for this service in the future, however, OBM is requesting a reasonable transition period, which will allow for the continuation of services as well as documenting the unique regulations, policies, and processes that the city follows.

The services of the Community Development Experts (CDE) are required to provide technical assistance needed to successfully report the performance and address any concerns and findings of our Entitlement programs, which consist of the Community Development Block Grant and Recovery, Emergency Shelter Grant, HOME Investment grant, Housing Opportunities for People with AIDS, Neighborhood Stabilization Programs I-III, and the COVID-19 portfolio, which includes the CDBG-CV, HOME-ARP, HOPWA-CV, as well as other HUD-funded COVID programs. In addition to providing technical assistance, CDE's services are needed provide training to City departments in entering, updating, and reconciling data into the US Department of Housing and Urban Development's Integrated Disbursement and Information Systems (IDIS) database.

2. The service of CDE is a continuous service needed in order to properly secure and maintain our funding by accurately reporting the accomplishments of our HUD-funded grants. The City has used the services of CDE since 2006 and has had three contract numbers for this vendor (PO# 12326 in 2006, PO# 15560 from 2007 – 2009, and PO# 19820 from 2009 – 2012, 85751 from 02/20/2022 - 02/20/2021) to identify and correct errors and to assist with the successful submission of data reported into the IDIS and DRGR System as well as provide guidance and technical advice on various HUD policies, procedures, and requirements.

3. CDE was established in 1997 and was one of the first companies to test and train the federal and local governments on the federal IDIS system, which is required for all accomplishment reporting for the HUD-funded programs. OBM conducted research and there are other organizations that perform consulting services for local governments, specifically pertaining to HUD-funded grants. However, CDE's unique experience and knowledge of the city of Chicago's special provisions, historic knowledge of the City's administration and procedures, historic knowledge and understanding of each department's program requirements and reporting elements, as well as CDE's extensive experience with HUD's reporting systems uniquely positions CDE to provide services to the City and ensure that there are no gaps in requirements and that all grant programs are implemented and expensed in accordance with federal rules and regulations as well as the City's rules and regulations. The City intends on working with CDE to develop a written roadmap detailing all historic information, requirements, and structure of the City's portfolio, which will help transition knowledge to the City staff as well as guide the scope of future procurements.

4. OBM conducted an internet search to identify other agencies that can provide this service and there are agencies that offer a similar service, however, CDE is unique because they were one of the lead organizations tasked with testing and training grantees the federal IDIS system when it was in development, as well as subsequent version upgrades with HUD and their grantees. CDE also has performed various trainings to HUD grantees and have provided other services directly for HUD and some of HUD's grantees, which gives them a wide spectrum of experience and knowledge used to help the City navigate through the various regulatory



**DEPARTMENT OF PROCUREMENT SERVICES
NON-COMPETITIVE REVIEW BOARD (NCRB) APPLICATION
JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

requirements and procedures needed to successfully implement HUD's programs. CDE also has historic knowledge on the City's special formula and capacity limits from HUD and provides critical insight and expertise in navigating the federal and City requirements. This experience has been particularly critical given the turnover in the position taken with managing the HUD portfolio, which brings an element of continuity and consistency in the management of the program. The first company is WFN Consulting (<https://wfnconsulting.com>) and provides HUD program management, KR Kimberly Richardson Consulting (<https://kimrichardsonconsulting.com>), Cloudburst Group (<https://cloudburstgroup.com/>), the City intends on competitively bidding for these services in the future.

5. Requests will be made to do business with the same source given that this agency has a very close business relationship with HUD and has become acquainted with the City's programs and reporting.

6. Future competition is possible and will be explored, however, the current consultant will be responsible for developing written policies and procedures outlining the City's historic programmatic details.

ESTIMATED COST

1. The estimated cost is up to \$300,000 (with a two year extension option) and will be funded with federal grant funds (Fund 0J48, CDBG), which would be \$100,000 annually.

2. The estimated cost in FY22 is \$100,000-annually (Estimated contract term Year 1: 05-01-2022 through 04-30-2023 and Year 2: 5/1/2023 - 4/30/2024).

3. The cost for these consulting and technical assistance services is less than existing consulting contracts that OBM currently utilizes, as the rate for CDE is \$140/hr vs other similar contracts whose rates are from \$175/hr to \$340/hr. The rate for CDE is also consistent with previous rates charged by this firm in the past, with a modest increase over the next 2 years. OBM believes the price is reasonable given the large amount of grant funds covered under this service, which includes the management of all HUD grants and the training of over 8 Entitlement-funded City departments and hundreds of associated activities, as well as providing technical assistance for the management of activities entered in the federal IDIS.

4. The contractor does not have any investment in this contract or service.

5. This price is competitive because CDE has not significantly increased their cost since doing business with the city and is proposing a modest increase over the next 3 years of the proposed contract term.

SCHEDULE REQUIREMENTS

The Entitlement programs are received annually and the associated schedule is aimed at assisting with key objectives/program requirements, including ensuring all activities are properly established and reconciled in the IDIS system, training department staff, and providing ongoing support to OBM for all Entitlement programs. Activities occur on an ongoing basis and the cost will be reimbursed based on the deliverables completed.

1. The schedule of services is based on the expiration of the current contract with this vendor and an internal discussion with the vendor to determine the expected resources for the future. In order to maintain technical assistance, an annual schedule must be maintained.

2. N/A

3. This contract will assist with ensuring that all federal requirements are adhered to under the HUD portfolio. Each requirement has a specific deadline and the schedule and completion dates will be based on each requirement of the program (i.e. CAPER federal required due date of March 31 of each year and activity will occur for months prior to the actual completion of the CAPER, IDIS Setups are ongoing and must be established before the CAPER is completed, training will be provided at least twice a year and will be determined by OBM based on the calendar availability, etc.).

4. The delay in this contract would lead to delays in critical reporting requirements based on regulation, project set up and drawdown of funding, troubleshooting issues, training of new and/or key staff members, and review of annual data entered into the IDIS system, as well as a host of other requirements needed for this program, which are necessary on an ongoing basis. In addition, this agency assists with the submission of time sensitive financial reports that are crucial to the continued funding by HUD.



**DEPARTMENT OF PROCUREMENT SERVICES
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JUSTIFICATION FOR NON-COMPETITIVE PROCUREMENT WORKSHEET**

EXCLUSIVE OR UNIQUE CAPABILITY

CDE has worked with the City since 2006 and understands the nature and complexities of the various federal requirements, program models/framework, and associated deliverables/accomplishments. CDE is a federally recognized technical assistance provider and provides assistance to dozens of state, county and local governments and has also provided technical assistance, training, and technical assistance directly to the federal government. CDE's experience with various entities and as a leading technical provider to HUD and its grantees over the years, CDE is uniquely positioned to ensure the continuity of services and to help ensure the City's compliance with all grantor requirements. Due to the frequent turnover and lack of resources in OBM, CDE offers a stop-gap to help with reporting requirements and training, which is critical to the successful implementation of the HUD grants.

1. N/A

2. N/A

3. This agency has exclusive knowledge of the IDIS system and was recommended by the US Department of Housing and Urban Development (HUD), which is our funding agency. This company was responsible for developing workshop materials, course content, and training to HUD grantees, since the inception of the IDIS. In addition, CDE's services are crucial in assisting the City with any issues related to IDIS. CDE is familiar with the information needed, navigation techniques, reporting aspects, and have addressed similar issues with other municipalities.

4. N/A

5. This company possesses advanced knowledge of the new modules of the IDIS online system related to the five-year Consolidate Plan and Annual Action Plan, which is our performance report and Budget submission.

6. N/A

7. N/A

8. N/A

OTHER

MBE/WBE COMPLIANCE PLAN

1. This agency has requested a waiver of the MBE/WBE requirements based on the fact that the company is a nationally based Black-owned business. Please see the waiver request for additional information.

Project Checklist

Attach required forms for each procurement type and detailed scope of services and/or specifications and forward original documents to the Chief Procurement Officer; City Hall, Room 806.

Date:
March 31, 2022

Department Name:
Office of Budget & Management

Requisition No:
422424

Specification No:
825738

PO No:
Modification No:

Contract Liaison:
Jessica Vera

Telephone:
4-3091

Email:
jessica.vera@cityofchicago.org

Project / Program Manager:
Latoya Vaughn

Telephone:
312-744-4742

Email:
latoya.vaughn@cityofchicago.org

For blanket agreements, original or lead department must consult with other potential departments who may want to participate on the blanket agreement. If grant funded, attach copy of the approved grant application and other terms and conditions of the funding source. Note: 1) **Funding**: Attach information if multiple funding lines; 2) **Individual Contract Services**: Include approval form signed by Department Head and OBM; 3) **ITGB**: IT project valued at \$100,000.00 or more, attach approval transmittal sheet.

**By signing this form, I attest that all information provided is true and accurate.*

*Contract Liaison Signature
Latoya Vaughn

Project Title:
Community Development Grants and Integrated Disbursement and Information System (IDIS) Technical Assistance

Project Description:
Provide technical assistance and training for City staff on the Department of Housing and Urban Development's (HUD) online reporting system, IDIS. Training and technical assistance may include verification of activity eligibility, development of required grant financial summaries as well as assistance in addressing findings related to annual HUD reporting requirements.

Funding:

Corporate Bond Enterprise Grant Other:
 IDOT/Transit IDOT/Highway FHWA FTA FAA

LINE	FY	FUND	DEPT	ORGN	APPR	ACTV	PROJECT	RPTG	ESTDOLLAR AMOUNT
1	022	0J48	005	2505	0140	0000		222505	100,000

Check One:
 New Contract Request

**By signing below, I attest the estimates provided for this contract are true and accurate.*

*Project / Program Manager Signature
Latoya Vaughn

*Commissioner/Authorized Designee Signature
[Signature]

Purchase Order Information:

Contract Term (No. of Months): 36 months

Extension Options (Rate of Recurrence): 2 (12 Month)

Estimated Spend/Value: \$ 300,000.00
Renews annually.

Grant Commitment / Expiration Date:

Pre-Bid/Submittal Conference: Yes No

Mandatory Site Visit

Purchase Order Type:

Blanket/Purchase Order (DUR)
 Master Consultant Agreement (Task Order)
 Standard/One-Time Purchase

Procurement Method:

Bid RFP RFQ RFI
 Small Order

Special Approvals Required:

Emergency
 Non-Competitive Review Board (NCRB)
 Request for Individual Contract Services
 Information Technology Governance Board (ITGB)

Contract Type:

Architect Engineering Commodity Construction JOC SBI
 Professional Services Revenue Generating Vehicle & Heavy Equipment
 Work Service Joint Procurement Reference Contract

Modification or Amendment

Modification Information:

PO Start Date:
PO End Date:
Amount (Increase/Reduction):

MBE/WBE/DBE Analysis: (Attach MBE/WBE/DBE Goal Setting Memo)

Full Compliance Contract Specific Goals
 No Stated Goals Waiver Request

Modification/Amendment Type:

Time Extension Scope Change/Price Increase /Additional Line Item(s)
 Vendor Limit Increase Requisition Encumbrance Adjustment
 Other (specify):

Risk Management / EDS

Insurance Requirements (included) Yes No
EDS Certification of Filing (included) Yes No

Vendor Info:


Name: Community Development Experts
Contact: Ronald Allen
Address: 18804 Impulse Lane, Gaithersburg, MD 20879
E-mail: ron@cdexperts.net
Phone: 240-888-6396



OFFICE OF BUDGET AND MANAGEMENT
CITY OF CHICAGO

MEMORANDUM

TO: Aileen Velazquez
Chief Procurement Officer
Department of Procurement Services

FROM: Susie Park 
Budget Director
Office of Budget and Management

DATE: March 31, 2022

RE: NCRB New Contract Request
Vendor: Community Development Experts
Prior PO#: 85751
Requisition#: 422424
Specification#: 825738

OBM respectfully requests a three-year contract for Community Development Experts (CDE). The requested contract term is May 1, 2022 – April 30, 2025, with an annual contract value of up to \$100,000, with two one-year extension options. CDE provides essential technical assistance and support for the U.S. Department of Housing and Urban Development's Entitlement programs, which consists of the Community Development Block Grant, HOME Investment Partnership, Housing Opportunities for People with AIDS, and the Emergency Solutions Grants, CDBG-Disaster Recovery, Neighborhood Stabilization Program (NSP), and the COVID CDBG-CV, ESG-CV, HOPWA-CV, and HOME-CV grants which totals over \$300 million annually. These services are critical to ensure compliance with federal reporting requirements governing the receipt of annual formula and pandemic funding.

Over the past 14 years, the Entitlement programs had been solely managed by the Supervisor of Grants Administration, in conjunction with the implementing and corresponding departments. In mid-2020, the Supervisor of Grants Administration position was vacated. In the interim, OBM assigned HUD grants to an analyst in the interim of hiring for a Supervisor of Grants Administration and that position was vacated as of July 15, 2021, leaving a gap in critical requirements of the Entitlement program, specifically related to activities, reconciliations, and training in the federal government's Integrated Disbursement and Information system (IDIS) system, which is an online reporting system used to manage activity accomplishment data and financial drawdown and reimbursements. The position was filled in October 2021, but has been recently vacated as of March 2022, which creates a tremendous void in support services for all HUD-funded programs.

This request for a new contract is delayed due to staffing transitions, which resulted in OBM missing the deadline to extend the current contract and submit a request for a new contract. The lack of assistance and support from an expert on Entitlement fund management jeopardizing compliance with federal regulations, specifically related to reporting and managing activities and finances in the IDIS system.

Enclosed are the following:

City Documents:

1. DPS Checklist
2. NCRB Justification
3. Statement of Work (SOW)
4. City of Chicago Concurrence to the Auto Insurance Waiver and MBE/WBE Waiver
5. CDBG Signed Agreement
6. CoC Terms and Conditions Email Confirmation

Vendor Documents:

1. Letter of Exclusivity
2. Proposed Scope (Statement of Work)
3. Cost Proposal
4. Workers Compensation and Auto Insurance Waiver
5. MBE/WBE Waiver
6. EDS Certificate
7. Liability Insurance

If you have any questions or concerns regarding this request, please contact me at 4-3323 or Latoya Vaughn, Deputy Budget Director, at 4-4742.

City of Chicago and Community Development Experts (CDE) Scope of Work

This Scope of Work (“SOW”), effective as of May 1, 2022, to April 30, 2025, is issued pursuant to a Consulting Agreement (“Agreement”) between the City of Chicago (“City”) and Community Development Experts (referred to in the Agreement as “Service Provider” and herein as “CDE”).

Background

CDE provides technical assistance and support for the U.S. Department of Housing and Urban Development’s Entitlement programs, which consists of the Community Development Block Grant, HOME Investment Partnership, Housing Opportunities for People with AIDS, and the Emergency Solutions Grants, Neighborhood Stabilization Program (NSP), and the COVID CDBG-CV, ESG-CV, HOPWA-CV, and HOME-CV which total over \$300 million annually.

CDE provides technical assistance, training, and support specifically related to the US Department of Housing and Urban Development’s Integrated Disbursement and Information System (IDIS) system, which is an online reporting system used to manage activity accomplishment data and financial drawdown and reimbursements. CDE experienced in providing training and technical assistance on all HUD rules, regulations, and cross cutting program requirements of HUD-funded programs.

CDE Objectives

The objectives of CDE are to provide technical assistance, support, and training to ensure compliance with all HUD-Funded Entitlement programs managed by OBM. Services will be aimed at the development of the Consolidated Plan and associated Action Plans, development of the Comprehensive Annual Performance Evaluation Report (CAPER), setup of activities and associated accomplishment data, and to provide training and support for department staff on managing activities and entering critical performance data.

CDE is responsible for entering all IDIS activities, advises the City on various financial and programmatic analysis for reports and data required. In addition, CDE will assist with the development of the Consolidated Plan and all associated Action Plans, as well as reporting and training.

Chicago Manager and Key Personnel

This contract will be managed by the Latoya Vaughn, Deputy Budget Director, in the Office of Budget and Management. The key personnel within CDE are Ronald Allen and Baron Bell.

Deliverables, Invoice Schedule, and Estimated Budget

The invoice schedules will be determined based on the approved work completed and will be ongoing throughout the contract.

Deliverables are:

- ❖ Completion of the 5- Year Consolidated Plan and Public Hearing (Con Plan and Action Plans)
- ❖ Consolidated Annual Performance and Evaluation Report (CAPER)

- ❖ Setup of All Entitlement Activities (including NSP) and Accomplishment Data (IDIS Reporting)
- ❖ Completion of the Draft and Annual Action Plan
- ❖ Ongoing Support with Audit Findings and Corrective Actions
- ❖ IDIS Activity Cleanup for New and At-Risk Projects, including the COVID-19 grants, DRGR, NSP Closeout activities
- ❖ Technical Assistance on all Entitlement Grants (including NSP, DRGR, COVID-19 and other HUD Grants)
- ❖ Develop a policy and transitional document that identifies all relevant historic information as well as City-specific and department-specific reporting and accomplishment information.

Table 2: Estimated Budget of \$100,000 (Annual)

- ❖ Annual Action Plan (E-Con Plan): \$20,000.00
- ❖ IDIS Activity Set Up (Programmatic): \$30,000.00
- ❖ IDIS CAPER: \$20,000.00
- ❖ IDIS Training: \$10,000.00
- ❖ NSP and DR: \$15,000.00
- ❖ ARP: \$2,500.00
- ❖ CARES: \$2,500.00

Latoya Vaughn

Digitally signed by Latoya Vaughn
DN: cn=Latoya Vaughn,
email=latoya.vaughn@cityofchicago.org, c=US
Date: 2022.06.06 10:55:20 -0500

Latoya Vaughn
Deputy Budget Director

COMMUNITY DEVELOPMENT EXPERTS

12212 Asbury Drive, Ft. Washington, Md 20744



Friday, January 28, 2022

Susie Park, Budget Director
Aileen Velazquez, Chief Procurement
City Hall
121 North LaSalle Street
Chicago, Illinois 60602

RE: MBE/WBE Waiver Request

Waiver of MBE/WBE

Community Development Experts is requesting a waiver of the MBE/WBE designation with the city for the following reasons.

First, CDE is a black owned two person, general partnership consulting firm known to both HUD Headquarters and the Chicago Field Office. CDE works not only with Chicago but with other grantees throughout the nation. The partners have provided technical assistance to HUD and its grantees since 1997. Due to our reputation as the leading HUD Online reporting systems experts in the nation, CDE has been fortunate enough to maintain a constant inventory of HUD clients who benefit from our services. Although CDE is a minority owned consulting firm, official participation in affirmative action federal programs has not proven to be necessary to secure contracts with HUD and/or grantees at the local level.

Second, although federal agencies cannot formally endorse contactors or consultants as it pertains to contracting opportunities, CDE is highly regarded and well known by HUD Chicago as both program and online reporting system's experts (IDIS/DRGR). As national IDIS trainers, CDE was originally alerted by HUD to system reporting issues the City was experiencing back in 2007 related to excessive public service expenditures and improper reporting of program accomplishments. Since that time CDE has provided successful technical assistance and program support for the HUD entitlement programs administered by the City. As a result CDE has become the de facto technical assistance representative to the city available to address issues, concerns or other inquires by HUD regarding the city's grant reporting.

Thanks for your consideration in this matter.

Sincerely,

A handwritten signature in cursive script that reads "Ronald L. Allen".


Ronald Allen
Partner



OFFICE OF BUDGET AND MANAGEMENT
CITY OF CHICAGO

MEMORANDUM

TO: Aileen Velazquez
Chief Procurement Officer
Department of Procurement Services

FROM: Susie Park 
Budget Director
Office of Budget and Management

DATE: March 31, 2022

RE: Request for MBE/WBE and Auto Insurance Waiver

OBM respectfully requests a waiver of the MBE/WBE and auto insurance requirements for the Community Development Experts (CDE). CDE is a minority owned partnership. However, this agency is not currently registered with the City as a MBE/WBE certified agency. CDE has worked with the City since 2007, offering specialized technical assistance and training to the City on HUD-related programs and works closely with the U.S. Department of Housing and Urban Development to ensure that the City is in compliance with the rules and regulations governing the HUD-funded programs.

OBM also requests a waiver of automobile insurance, as CDE conducts business from Gaithersburg, Maryland and travels to Chicago, Illinois for training. Personal automobiles are not utilized for in-person training and technical assistance conducted in Chicago. When CDE conducts in-person training and technical assistance, CDE commutes using public transportation and has requested a waiver for auto insurance.

If you have any questions or concerns regarding this request, please contact me at 4-3323 or Latoya Vaughn, Deputy Budget Director, at 4-4742.

Funding Approval/Agreement

Title I of the Housing and Community Development Act (Public Law 930383)
 HI-00515R of 20515R

U.S. Department of Housing and Urban Development
 Office of Community Planning and Development
 Community Development Block Grant Program

OMB Approval No. 2506-0193
 exp 5/31/2018

1 Name of Grantee (as shown in item 5 of Standard Form 424) Chicago	3a Grantee's 9-digit Tax ID Number 360005820	3b Grantee's 9 digit OJNS Number 942439068
2 Grantee's Complete Address (as shown in item 5 of Standard Form 424) 121 North LaSalle Street Chicago, IL 60602-0000	4. Date use of funds may begin 08/03/2021	
	5a Project/Grant No 1 B-21-MC-17-0006	6a Amount Approved \$80,095,464
	5b Project/Grant No 2	6b Amount Approved

Grant Agreement: This Grant Agreement between the Department of Housing and Urban Development (HUD) and the above named Grantee is made pursuant to the authority of Title I of the Housing and Community Development Act of 1974, as amended, (42 USC 5301 et seq.). The Grantee's submissions for Title I assistance, the HUD regulations at 24 CFR Part 570 (as now in effect and as may be amended from time to time), and this Funding Approval, including any special conditions, constitute part of the Agreement. Subject to the provisions of this Grant Agreement, HUD will make the funding assistance specified here available to the Grantee upon execution of the Agreement by the parties. The funding assistance specified in the Funding Approval may be used to pay costs incurred after the date specified in item 4 above provided the activities to which such costs are related are carried out in compliance with all applicable requirements. Pre-agreement costs may not be paid with funding assistance specified here unless they are authorized in HUD regulations or approved by waiver and listed in the special conditions to the Funding Approval. The Grantee agrees to assume all of the responsibilities for environmental review, decision making, and actions, as specified and required in regulations issued by the Secretary pursuant to Section 104(g) of Title I and published in 24 CFR Part 58. The Grantee further acknowledges its responsibility for adherence to the Agreement by sub-recipient entities to which it makes funding assistance hereunder available.

U.S. Department of Housing and Urban Development (By Name) Donald G. Kathan		Grantee Name (Contractual Organization) Chicago (City of Chicago)	
Title CPD Director		Title Budget Director	
Signature DONALD KATHAN <i>x</i>	Date 08/03/2021	Signature <i>x</i>	Date (mm/dd/yyyy) 8/5/2021

7 Category of Title I Assistance for this Funding Action Entitlement, Sec 106(b)	8. Special Conditions (check one) <input type="checkbox"/> None <input checked="" type="checkbox"/> Attached	9a. Date HUD Received Submission 05/28/2021	10. check one <input checked="" type="checkbox"/> a. Orig Funding Approval <input type="checkbox"/> b. Amendment Amendment Number
		9b. Date Grantee Notified 08/03/2021	
9c. Date of Start of Program Year 01/01/2021			
11. Amount of Community Development Block Grant			
a. Funds Reserved for this Grantee	FY 2021		
b. Funds now being Approved	\$80,095,464		
c. Reservation to be Cancelled (11a minus 11b)			

12a. Amount of Loan Guarantee Commitment now being Approved N/A	12b. Name and complete Address of Public Agency City of Chicago 121 North LaSalle Street Chicago, IL 60602-0000
Loan Guarantee Acceptance Provisions for Designated Agencies: The public agency hereby accepts the Grant Agreement executed by the Department of Housing and Urban Development on the above date with respect to the above grant number(s) as Grantee designated to receive loan guarantee assistance, and agrees to comply with the terms and conditions of the Agreement, applicable regulations, and other requirements of HUD now or hereafter in effect, pertaining to the assistance provided it.	12c. Name of Authorized Official for Designated Public Agency
	Title Signature <i>x</i>

HUD Accounting use Only

Batch	TAC	Program	Y	A	Reg	Area	Document No	Project Number	Category	Amount	Effective Date (mm/dd/yyyy)	F
	153											
	176											
			Y					Project Number		Amount		
			Y					Project Number		Amount		

Date Entered PAS (mm/dd/yyyy)	Date Entered LOCCS (mm/dd/yyyy)	Batch Number	Transaction Code	Entered By	Verified By
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8. Special Conditions.

- (a) The period of performance for the funding assistance specified in the Funding Approval ("Funding Assistance") shall begin on the date specified in item 4 and shall end on September 1, 2028. The Grantee shall not incur any obligations to be paid with such assistance after September 1, 2028.
- (b) The Recipient shall attach a schedule of its indirect cost rate(s) in the format set forth below to the executed Agreement that is returned to HUD. The Recipient shall provide HUD with a revised schedule when any change is made to the rate(s) described in the schedule. The schedule and any revisions HUD receives from the Recipient shall be incorporated herein and made a part of this Agreement, provided that the rate(s) described comply with 2 CFR part 200, subpart E.

<u>Administering Department/Agency</u>	<u>Indirect cost rate</u>	<u>Direct Cost Base</u>
Mayor's Office for People with Disabilities	56.15%	Salaries/Wages + Fringes
Department on Human Relations	63.46%	Salaries/Wages + Fringes
Department of Housing	54.04%	Salaries/Wages + Fringes
Department of Planning and Development	36.23%	Salaries/Wages + Fringes
Department of Family and Support Services	80.80%	Salaries/Wages + Fringes
Department of Public Health	34.81%	Salaries/Wages + Fringes
Department of Assets, Information, and Services	45.72%	Salaries/Wages + Fringes

Instructions: The Recipient must identify each agency or department of the Recipient that will carry out activities under the grant, the indirect cost rate applicable to each department/agency (including if the de minimis rate is used per 2 CFR §200.414(f)), and the type of direct cost base to which the rate will be applied (for example, Modified Total Direct Costs (MTDC)). Do not include indirect cost rates for subrecipients.

- (c) In addition to the conditions contained on form HUD 7082, the grantee shall comply with requirements established by the Office of Management and Budget (OMB) concerning the Dun and Bradstreet Data Universal Numbering System (DUNS); the System for Award Management (SAM.gov.); the Federal Funding Accountability and Transparency Act as provided in 2 CFR part 25, Universal Identifier and General Contractor Registration; and 2 CFR part 170, Reporting Subaward and Executive Compensation Information.
- (d) The grantee shall ensure that no CDBG funds are used to support any Federal, State, or local projects that seek to use the power of eminent domain, unless eminent domain is employed only for a public use. For the purposes of this requirement, public use shall not be construed to include economic development that primarily benefits private entities. Any use of funds for mass transit, railroad, airport, seaport or

highway projects as well as utility projects which benefit or serve the general public (including energy-related, communication-related, water-related and wastewater-related infrastructure), other structures designated for use by the general public or which have other common-carrier or public-utility functions that serve the general public and are subject to regulation and oversight by the government, and projects for the removal of an immediate threat to public health and safety or brownfield as defined in the Small Business Liability Relief and Brownfields Revitalization Act (Public Law 107-118) shall be considered a public use for purposes of eminent domain.

- (e) The Grantee or unit of general local government that directly or indirectly receives CDBG funds may not sell, trade, or otherwise transfer all or any such portion of such funds to another such entity in exchange for any other funds, credits or non-Federal considerations, but must use such funds for activities eligible under title I of the Act.
- (f) E.O. 12372-Special Contract Condition - Notwithstanding any other provision of this agreement, no funds provided under this agreement may be obligated or expended for the planning or construction of water or sewer facilities until receipt of written notification from HUD of the release of funds on completion of the review procedures required under Executive Order (E.O.) 12372, Intergovernmental Review of Federal Programs, and HUD's implementing regulations at 24 CFR Part 52. The recipient shall also complete the review procedures required under E.O. 12372 and 24 CFR Part 52 and receive written notification from HUD of the release of funds before obligating or expending any funds provided under this agreement for any new or revised activity for the planning or construction of water or sewer facilities not previously reviewed under E.O. 12372 and implementing regulations.
- (g) CDBG funds may not be provided to a for-profit entity pursuant to section 105(a)(17) of the Act unless such activity or project has been evaluated and selected in accordance with Appendix A to 24 CFR 570 - "Guidelines and Objectives for Evaluating Project Costs and Financial Requirements." (Source - P.L. 113-235, Consolidated and Further Continuing Appropriations Act, 2015, Division K, Title II, Community Development Fund).

COMMUNITY DEVELOPMENT EXPERTS

12212 Asbury Drive
Ft. Washington, Md 20744



March 21, 2022

Aileen Velazquez, Chief Procurement
Officer City Hall
121 North LaSalle Street
Chicago, Illinois 60602

RE: Letter of Exclusivity

Dear Aileen:

Letter of Exclusivity

Community Development Experts is submitting this response to the question of exclusivity of services we propose to the City of Chicago's Office of Budget and Management related to its four entitlement programs and IDIS (Integrated Disbursement and Information System).

First, CDE's knowledge of both HUD programs and expertise in department reporting systems is a very specialized body of work not easily attained. It requires practical experience with federal programs at the local level and hours of hands-on training, technical assistance, and extensive experience with HUD reporting systems. CDE has provided federal reporting systems services since 1997 and has acquired substantial program knowledge working both at the local level and nationally as a technical assistance provider. CDE partners were employed with a HUD contracting firm from 1996 – 2003 conducting trainings on HUD Community Planning and Development programs including CDBG, HOME, HOPW and ESG. It's important to note that because of our status as national IDIS trainers, CDE has system access to view the IDIS data of all one thousand plus HUD grantees at any time. This enables us to be more informed and prepared to assist any HUD grantee when providing technical assistance support that would otherwise be unavailable to others seeking to provide similar assistance. With this special access to all grantee data, CDE can isolate problems and issues and develop solutions and troubleshoot more effectively than those without access.

Second, CDE has provided critical and necessary IDIS technical support to OBM since late 2007 and, as a result, has helped the city to successfully address HUD findings and concerns related to grant reporting. Our tenure with the city has provided CDE with an extensive working knowledge of City's grant programs which enables us to quickly and effectively provide support services to the various departments in the areas of grant program planning, implementation, and annual reporting requirements. Our ability to provide solutions to problems and concerns is a direct result of our knowledge base of each department acquired over time through both hands-on work and direct relationships with department staff.

In conclusion, the combination of both HUD program and reporting system knowledge and our working relationship with Chicago Department staff, now fourteen years active, coupled with intimate familiarity with its grant management practices equips CDE with the necessary skills and resources currently unavailable by other potential contractors.

Thanks for your consideration in this matter.

Sincerely,

Ronald L. Allen

Ronald Allen
Partner

COMMUNITY DEVELOPMENT EXPERTS



Community Development Experts (CDE) Proposal for City of Chicago

March 21, 2022

Ms. Latoya Vaughn
Deputy Director
Office of Management and Budget

Dear Ms. Vaughn,

Community Development Experts is pleased to present the following proposal to deliver training and technical assistance to the City of Chicago for its federal housing and community development programs.

INTRODUCTION

CDE is among the nation's foremost providers of training and technical assistance to HUD state and entitlement grantees. CDE provides support to recipients on both program administration of formula grant programs and usage of the department's Integrated Disbursement and Information System (IDIS). IDIS is the draw down and reporting system used by the Department for the oversight of the Community Development Block Grant (CDBG), Home Investments In Partnership (HOME), Emergency Solutions Grant (ESG), and Housing Opportunity For Persons With HIV/AIDS (HOPWA) formula grant programs. To successfully provide training and technical assistance in IDIS, CDE stays current on all updates and changing program and system requirements regarding eligibility and reporting for HUD entitlements. Thus, CDE is capable of training grantee staff on all applicable requirements of these programs.

Areas of Grant Assistance

CDE proposes to offer training and technical assistance to the City of Chicago addressing the rules, regulations, and cross cutting program requirements of federal housing and community development programs.

The training and technical assistance focuses on the following subject areas:

1. **Unit--Consolidated Plan/Annual Action Plan (E-Conplan);**
 - a. Executive Summary
 - b. Market Analysis & Needs Assessment
 - c. Strategic Planning
 - i. Available Funds
 - ii. Priority Needs
 - iii. Geographic Priorities
 - iv. Goals
 - v. Performance Indicators
 - vi. Project Set Up
2. **Unit—IDIS Programmatic**
 - a. Activity Set Up Information
 - b. Activity Completion Information
 - i. Beneficiary data
 - ii. Performance Measures
3. **Unit--IDIS CAPER**
 - a. Downloading and analyzing reports
 - b. Setting Up Code Enforcement Activities
 - c. Completing PR26 CDBG Financial Summary Report.

4. **Unit—IDIS Training**
 - a. Train department staff on program information entered into IDIS
 - b. Train comptroller staff on financial information entered into IDIS
5. **Unit – NSP/DRGR**
 - a. Facilitate formal close out of each of the NSP programs
 - b. Set up remaining program activities and complete activities in DRGR
 - c. Generate monthly and required quarterly reports for all NSP program grants.
6. **Unit – American Rescue Plan (ARP)**
 - a. Activity Set Up Information
 - b. Activity Completion
 - i. Beneficiary Data
 - ii. Performance Measures
7. **Unit – CARES**
 - a. Activity Set Up Information
 - b. Activity Completion
 - i. Beneficiary Data
 - ii. Performance Measures
8. **Unit – Section 108**
 - a. Program Requirements
 - b. Activity Set Up Information
 - c. Activity Completion

Should you have any questions about this proposal or any other questions related to these services, please contact me at (240) 888-6396. CDE looks

Community Development Experts (CDE)
Proposal for City of Chicago

forward to the opportunity to continue serving the City of Chicago's Office of Budget and Management.

Sincerely,

Ronald L. Allen

Ronald Allen

Partner

Community Development Experts

12212 Asbury Dr, Ft. Washington, MD 20744

Office: (240) 888-6396

COMMUNITY DEVELOPMENT EXPERTS



3/21/2022

Community Development Experts (CDE) Proposal for City of Chicago

Estimated Costs Detail:

Year 1 (\$135hr)

1. Unit--Consolidated Plan/Annual Action Plan (E-Conplan); \$20,000.00
2. Unit—IDIS Activity Set Up (Programmatic) \$30,000.00
3. Unit--IDIS CAPER \$20,000.00
4. Unit—IDIS Training \$5,000.00
5. Unit – NSP/DRGR \$15,000
6. Unit – American Rescue Plan \$2,500
7. Unit – CARES \$5,000
8. Unit – Section 108 \$2,500

Year 2 (\$140hr)

1. Unit--Consolidated Plan/Annual Action Plan (E-Conplan); \$20,000.00
2. Unit—IDIS Activity Set Up (Programmatic) \$30,000.00
3. Unit--IDIS CAPER \$20,000.00
4. Unit—IDIS Training \$5,000.00
5. Unit – NSP/DRGR \$15,000
6. Unit – American Rescue Plan \$2,500
7. Unit – CARES \$5,000
8. Unit – Section 108 \$2,500

Year 3 (\$145hr)

1. Unit--Consolidated Plan/Annual Action Plan (E-Conplan); \$20,000.00
2. Unit—IDIS Activity Set Up (Programmatic) \$30,000.00
3. Unit--IDIS CAPER \$20,000.00
4. Unit—IDIS Training \$5,000.00
5. Unit – NSP/DRGR \$15,000.00
6. Unit – American Rescue Plan \$2,500

Community Development Experts (CDE)
Proposal for City of Chicago
Introduction Federal Housing and Community Development Program Requirements

- 7. **Unit – CARES \$5,000**
- 8. **Unit – Section 108 \$2,500**

Should you have any questions about the estimated cost or any other questions related to these services, please contact me at (240) 888-6396. CDE looks forward to the opportunity to continuing serving the City of Chicago.

Sincerely,

Ronald L. Allen

Ronald Allen
Partner
Community Development Experts
12212 Asbury Dr, Ft. Washington, Md 20744
Office: (240) 888-6396

COMMUNITY DEVELOPMENT EXPERTS



May 9, 2022

Susie Park, Budget Director
Aileen Velazquez, Chief Procurement Officer
121 North LaSalle Street
Chicago, Illinois 60602

RE: Worker's Compensation/Employer's Liability and Automobile Insurance Waiver Request

Susie and Aileen:

Community Development Experts is requesting a waiver from specific insurance coverage requirements related to Worker's Compensation and Employer's Liability and Automobile Liability in our contract extension with the Office of Budget and Management anticipated for 2022-2024.

As with prior contracts with OBM, CDE was extended a waiver from coverage for the two insurance items identified above and the current contract under consideration involves the same scope of services. CDE is a two person consulting partnership with no employees and, as with previous work with OBM, all work items will continue to be carried out exclusively by the consulting team partners, Ron Allen and Baron Bell. The body of work to be conducted by CDE for the City requires substantial specialized technical expertise which precludes the employment of persons for any assignments related to this project. Again, all CDE contract work is carried out exclusively by the two partners.

Similarly, auto insurance has proven to be unnecessary since our work is conducted exclusively via the internet accessing a federal reporting system. Upon our infrequent visits to the city, CDE has successfully taken advantage of the extensive public transportation system available which eliminates the need for commercial vehicle rental.

CDE understands the city's need to ensure appropriate insurance coverage with businesses engaged in contract work with the city, but we again ask for an exemption from the identified specific coverages as our work demonstrates that it is essentially unnecessary to how we carry out and perform services to OBM.

Thanks for your consideration in this matter.

Sincerely,

A handwritten signature in cursive script that reads "Ronald L. Allen". The ink is dark and the signature is fluid and legible.

Ronald Allen
Partner



CERTIFICATE OF FILING FOR
CITY OF CHICAGO ECONOMIC DISCLOSURE STATEMENT

EDS Number: 166477

Certificate Printed on: 10/12/2021

Date of This Filing: 10/12/2021 05:51 PM

Original Filing Date: 10/12/2021 05:51 PM

**Disclosing Party: Community Development
Experts**

Title: General Partner

Filed by: Mr. Ronald Lee Allen

Matter: Federal Grant Reporting Support

Applicant: Community Development Experts

Specification #:

Contract #:

The Economic Disclosure Statement referenced above has been electronically filed with the City. Please provide a copy of this Certificate of Filing to your city contact with other required documents pertaining to the Matter. For additional guidance as to when to provide this Certificate and other required documents, please follow instructions provided to you about the Matter or consult with your City contact.

A copy of the EDS may be viewed and printed by visiting <https://webapps1.chicago.gov/eds> and entering the EDS number into the EDS Search. Prior to contract award, the filing is accessible online only to the disclosing party and the City, but is still subject to the Illinois Freedom of Information Act. The filing is visible online to the public after contract award.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/26/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER DAN CORRIGAN INSURANCE, LLC 213 LANDING LANE ELKTON, MD 21921	CONTACT NAME: BRUCE SHIFFLETT PHONE (A/C, No, Ext): 410-620-0990 E-MAIL ADDRESS: BRUCE@DANCINSURANCE.COM	FAX (A/C, No): 410-620-3857
	INSURER(S) AFFORDING COVERAGE	
INSURED COMMUNITY DEVELOPMENT EXPERTS 12212 ASBURY DRIVE FORT WASHINGTON, MD 20744	INSURER A: UNITED STATES LIABILITY INSURANCE CO.	
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

COVERAGES**CERTIFICATE NUMBER:****REVISION NUMBER:**


THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		PPP1555201	06/25/2021	06/25/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 1,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED \$ RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory In NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	ERRORS & OMISSIONS LIABILITY			PPP1555201	06/25/2021	06/25/2023	AGGREGATE LIMITS \$1,000,000 EACH CLAIM LIMITS \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

THE CERTIFICATE HOLDER IS LISTED AS AN ADDITIONAL INSURED ON THE GENERAL LIABILITY POLICY.

CERTIFICATE HOLDER**CANCELLATION**

DEPARTMENT OF PROCUREMENT SERVICES CITY OF CHICAGO 121 N. LASALLE STREET, ROOM 806 CHICAGO, IL 60602	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE BRUCE SHIFFLETT 
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