

State of Oregon



Oregon Housing and Community Services Department

REQUEST FOR INFORMATION (RFI)

ORPIN Number: 914-6024-20

Seeking Information About:

Monitoring and Evaluation Plan for Oregon Housing and Community Services

Date of Issue: September 24, 2020

Responses Due Date/Time: October 8, 2020 at 3:00 p.m. PDT

Issuing Office: Oregon Housing and Community Services Department

Contact Name: Lisa Cimino, Senior Procurement Specialist

Address: 725 Summer Street NE, Suite B, Salem, OR 97301

E-mail: OHCS.Contracts@oregon.gov

Please review the attached RFI. If you are interested in submitting information, you may send your response to the RFI to OHCS.Contracts@oregon.gov by the Responses Due Date/Time.

1.0 Background

Oregon Housing and Community Services (OHCS) seeks to become an outcomes oriented, results based organization that uses data to monitor our progress and drive our decision-making. OHCS is a funder, not a service provider. We provide funding for hundreds of grantees to deliver services to Oregonians who are seeking:

- homeless prevention services and programs
- affordable rental housing
- homeownership
- energy and weatherization assistance

In 2018, OHCS released a 5-year strategic plan; the Statewide Housing Plan advances the priorities that are most important to create long-term, stable housing for all Oregonians across the state. The Statewide Housing Plan is bold and using this plan as our guide, OHCS intends to promote secure housing from all of the angles we represent: homeownership, homeless services and homeless prevention, affordable housing, and permanent supportive housing.

We are now 2 years into the implementation of our Statewide Housing Plan and it is clear that we need a more robust way to measure the outcomes and impacts of the outputs of our strategic plan. OHCS is seeking one or two consultants to **design and implement both a process and a system to monitor and evaluate the outcomes and impacts of our agencies priorities, strategies, and eventually, our programs**. The consultant will also lead OHCS in developing appropriate outcomes and impacts that align with the goals of our Statewide Housing, engaging with both internal staff and external stakeholders. Furthermore, a monitoring and evaluation system that centers equity and racial justice is an essential component of both the development and result of this system.

OHCS seeks consultant(s) that can clearly tie the strategies and outputs of our Statewide Housing Plan with desired outcomes by identifying metrics and methodologies for measure the metrics so that we may track our progress towards these outcomes. The result may look a handful of ways, but needs to be a clear system of measuring, tracking, and visualizing clearly our progress towards achieving intended outcomes. This monitoring and evaluation system will not only help OHCS to track our current strategies and outputs to intended outcomes, but will serve as a strong foundation for future strategic planning and goal setting for the agency.

2.0 Strategic Plan

Below, you will find the six priorities of our 5-year Statewide Housing Plan. In addition to the six priorities of the Statewide Housing Plan Priorities, OHCS would like to include our energy and weatherization programs, business services processes, procurement, and human resources data and priorities in our monitoring and evaluation system.

The six priorities and goals are laid out here in a truncated format. For more detailed information on each of the priorities and to view additional implementation strategies that are not listed here, please refer to our [Statewide Housing Plan](#).

2.1 Statewide Housing Plan 6 Priorities to Measure and Evaluate

Priority #1: Equity and Racial Justice

ERJ Goals

- Communities of Color experience increased access to OHCS resources

- Communities of Color achieve greater parity in housing stability, self-sufficiency and homeownership

Implementation Strategies –_how OHCS intends to put the goals into practice.

- Create a system to analyze access to OHCS programs and practices for communities of color to ensure equitable outcomes
- Track, analyze, and measure performance and progress towards equity goals
- Publish a state of equity numerical target – this is a work in progress

Priority #2: Homelessness –Build a coordinate statewide effort to prevent and end homelessness

Homelessness Goals

- Increase the percentage of people who retain permanent housing for 6 months after receiving homeless services

Implementation Strategies:

- Enhance the states homeless service providers data and research capacity
- Prevent and end child homelessness
- End veteran homelessness

Priority #3: Permanent Supportive Housing (PSH) – Reduce chronic homelessness and barriers to housing stability

Permanent Supportive Housing Goal

- Create 1,000 additional permanent supportive housing units

Implementation Strategies

- Expand the pool of resources for PSH
- Development of state-funded tenant and project based rental assistance program
- Encourage the use of Homeless Management Information Systems
- Cross-system data sharing

Priority #4: Affordable Rental Housing – Close the affordable rental-housing gap and reduce housing cost burden for low-income Oregonians

Affordable Rental Housing Goals

- Triple the existing pipeline of affordable rental housing – up to 25,000 homes in the development pipeline by 2023.

Implementation Strategies:

- Expedite the delivery of affordable housing
- Identify and remove barriers to affordable rental housing
- Educate and empower local leaders to support affordable housing development

Priority #5: Homeownership – Provide low-income or moderate income Oregonians with tools to achieve and maintain homeownership, particularly communities of color

Goals

- Assist 6,500 households to become homeowners through mortgage lending products.
- Double the number of homeowners of color in homeownership programs.

Implementation Strategies:

- Expand the reach of existing mortgage loan programs
- Connect communities of color to homeownership

- Preservation and improvement of manufactured housing

Priority #6: Rural Communities – Change the way OHCS does business in small towns and rural communities

Goal:

- Increase OHCS funded housing in rural areas by 75%

Implementation Strategies:

- Evaluate, identify and remove systematic barriers to accessing OHCS resources
- Maintain quality of existing housing stock

The 6 priorities and goals make up the strategic plan for which OHCS intends to develop a monitoring and evaluation system. We have drafted the following questions in order to understand how you/your firm might approach this type of project. Additionally, answers to the following questions will help OHCS clarify what is within the realm of possibilities for an in-depth monitoring and evaluation plan and what a final, usable end-product would look like.

3.0 RFI Questions

Please take a moment and respond to any or all of the following questions.

Note: Please respond in chronological order and label each response with the associated number.

1. What key process steps would you/your firm have in place to design a monitoring and evaluation system?
2. How long does this process take?
3. What is the final product(s) of a monitoring and evaluation system specifically designed to monitor and evaluate a strategic plan?
4. How can a monitoring and evaluation system support the implementation of a strategic plan?
5. What are the key differences between monitoring and evaluation product and program evaluation?
6. How do you define outcomes and impacts?
7. How is your process and end product infused with equity and racial justice?
8. What other recommendations do you have for an organization building a more data-driven, outcomes-oriented culture and operations?
9. How would your process incorporate engagement with communities of color, persons with lived experience and engagement of the communities we are currently serving?
10. How does your approach differ between public and private sector clients for a process like this?
What do you do to tailor your approach for the public sector, specifically a statewide agency?

4.0 Responder Submission

Information and responses to questions should be succinct. Proposers are encouraged to provide answers to the 10 questions in Section 3.0; however, OHCS will accept a partial response to Section 3.0.

Identify the RFI name and number. Responses must be emailed to OHCS.Contracts@oregon.gov by the deadline listed on page 1. Include your entity name and contact information.

All responses and any accompanying documentation become the property of the State of Oregon, subject to the Oregon Public Records Law, and will not be returned.

OHCS will not be responsible for any error or omissions from downloading the RFI. The official RFI document is the one held at OHCS.

5.0 Costs and Fees

All costs associated with Responder's preparation and submission of this RFI is the sole responsibility of the Responder and shall not be borne by OHCS or the State of Oregon.

6.0 General Process Information

6.1 Schedule

The following are key dates specific to this RFI:

RFI Issued	September 24, 2020
Questions for Clarification	October 1, 2020 at 3:00 p.m. PDT
Closing	See page 1.

6.2 Questions

All inquiries must be sent electronically to OHCS.Contracts@oregon.gov by the deadline published in section 6.1 Schedule. Reference the RFI name and number.

6.3 Responder Participation

It is very important that the state support its local businesses and various socioeconomic programs, including but not limited to, the Certification Office for Business Inclusion & Diversity (COBID) registered and disabled veteran-owned businesses. A listing of COBID certified firms is available at: <https://oregon4biz.diversitysoftware.com/FrontEnd/VendorSearchPublic.asp>.

This RFI may or may not result in a RFP. Responses provided to this RFI will be used only for general information purposes and will not be considered binding on any party. Responses provided to this RFI will also not have any impact on any RFP selection process.

Submission of a response to the RFI does not constitute an agreement between the State and the Respondent, nor does it secure or imply that Respondent will be selected or given any preferential access or availability to future funding opportunities that may arise as a result of this RFI.

7.0 Public Record/Confidential or Proprietary Information

This RFI and one copy of each original response received in response to it shall be kept by OHCS and made a part of a file or record that may be open to public inspection. If an RFI response contains any information that is considered a trade secret under ORS 192.501(2), or is otherwise exempt from disclosure under the Oregon Public Records Law, ORS 192.410 through 192.505, if applicable, the vendor shall complete and submit the Affidavit of Trade Secret (Attachment A to this RFI) and a fully redacted version of its response, clearly identified as the redacted version.

If applicable, the Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and some exemptions from disclosure apply only “unless the public interest requires disclosure in the particular instance.” Therefore, non-disclosure of documents or any portion of a document submitted as part of a response to this RFI may depend upon official or judicial determinations made pursuant to the public records laws and requirements. If applicable, OHCS may give vendor notice of any required disclosure and cooperate with vendor, at vendor’s expense, in seeking reasonable protective arrangements. However, OHCS shall not be required to act in a manner which would result in any sanctions or other penalties.

Vendors are cautioned that cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the submission, in whole, as exempt from disclosure is not acceptable.

8.0 Pay Equity Compliance

As required by [ORS 279B.235 or ORS 279C.520], Contractor shall comply with ORS 652.220 and shall not discriminate against any of Contractor’s employees in the payment of wages or other compensation for work of comparable character, the performance of which requires comparable skills, or pay any employee at a rate less than another for comparable work, based on an employee’s membership in a protected class.

Commencing on January 1, 2019, Contractor must comply with ORS 652.220 as amended and shall not unlawfully discriminate against any of Contractor’s employees in the payment of wages or other compensation for work of comparable character on the basis of an employee’s membership in a protected class. “Protected class” means a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability or age. Contractor’s compliance with this section constitutes a material element of this Contract/Price Agreement and a failure to comply constitutes a breach that entitles OHCS to terminate this Contract/Price Agreement for cause.

Contractor may not prohibit any of Contractor’s employees from discussing the employee’s rate of wage, salary, benefits, or other compensation with another employee or another person. Contractor may not retaliate against an employee who discusses the employee’s rate of wage, salary, benefits, or other compensation with another employee or another person.

Attachment A – AFFIDAVIT OF TRADE SECRET

(Affiant), being first duly sworn under oath, and representing [insert Vendor/Responder's Name] (hereafter "Vendor"), hereby deposes and swears or affirms under penalty of perjury that:

1. I am an employee of the Vendor, I have knowledge of the Request for Information (RFI) referenced herein, and I have full authority from the Vendor to submit this affidavit and accept the responsibilities stated herein.
2. I am aware that the Vendor has submitted a submission, dated on or about [insert date] (the "Submission"), to OHCS in response to RFI #914-4672-18, for the Evaluation of Low Income Bill Payment Assistance Programs and I am familiar with the contents of the RFI and Submission.
3. I have read and am familiar with the provisions of Oregon's Public Records Law, Oregon Revised Statutes ("ORS") 192.410 through 192.505, and the Uniform Trade Secrets Act as adopted by the State of Oregon, which is set forth in ORS 646.461 through ORS 646.475. I understand that the Submission is a public record held by a public body and is subject to disclosure under the Oregon Public Records Law unless specifically exempt from disclosure under that law.
4. I have reviewed the information contained in the Submission. The Vendor believes the information listed in **Exhibit A** is exempt from public disclosure (collectively, the "Exempt Information"), which is incorporated herein by this reference. It is my opinion that the Exempt Information constitutes "Trade Secrets" under either the Oregon Public Records Law or the Uniform Trade Secrets Act as adopted in Oregon because that information is either:
 - A. A formula, plan, pattern, process, tool, mechanism, compound, procedure, production data, or compilation of information that:
 - i. is not patented,
 - ii. is known only to certain individuals within the Vendor's organization and that is used in a business the Vendor conducts,
 - iii. has actual or potential commercial value, and
 - iv. gives its user an opportunity to obtain a business advantage over competitors who do not know or use it. or
 - B. Information, including a drawing, cost data, customer list, formula, pattern, compilation, program, device, method, technique or process that:
 - i. Derives independent economic value, actual or potential, from not being generally known to the public or to other persons who can obtain economic value from its disclosure or use; and
 - ii. Is the subject of efforts by the Vendor that are reasonable under the circumstances to maintain its secrecy.
5. I understand that disclosure of the information referenced in Exhibit A may depend on official or judicial determinations made in accordance with the Public Records Law.

Affiant's Signature

State of _____)

County of _____)

Signed and sworn to before me on _____ (date) by _____ (Affiant's name).

Notary Public for the State _____

of My Commission Expires: _____

EXHIBIT A - AFFIDAVIT OF TRADE SECRET

Vendor identifies the following information as exempt from public disclosure:

[Insert if applicable]