

**NEIGHBORHOOD OPPORTUNITY FUND  
REQUEST FOR QUALIFICATIONS (RFQ) FOR TECHNICAL ASSISTANCE  
PROVIDERS**

**By:** SomerCor 504, Inc.

**Date:** January 24, 2025

**Purpose:** SomerCor is seeking applications for professional services firms, architectural firms, non-profit organizations, sole proprietors and other professionals to provide specific technical assistance (“TA”) services for Neighborhood Opportunity Fund (NOF) participants in completing their projects.

The goal is to develop a list of approved, pre-qualified technical assistance service providers (“Approved TA Providers”) who will reliably and consistently work with NOF participants.

This RFQ specifically seeks professionals and firms who can provide technical assistance in the following roles:

- Construction Project Managers
- Architectural Firms

Inclusion on the list of Approved TA Providers does not ensure that an individual Approved TA Provider will be chosen by NOF participants to contract for professional services. All Approved TA Providers will be evaluated periodically for continued inclusion on the NOF Approved TA Providers list.

**Due Date:** To be considered for inclusion on the initial list of Approved TA Providers for the NOF program, responses must be submitted no later than February 28, 2025, 5 PM CST.

Future solicitations for additional Approved TA Providers may occur on a to-be-determined basis.

Responses are to be submitted electronically via [Submittable](#).

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### **I. Neighborhood Opportunity Fund Overview**

In 2016, the City of Chicago implemented reforms to the City’s Zoning Code to ensure that the growth of downtown drives equitable development throughout the City. These changes created the Neighborhood Opportunity Fund, leveraging new development in and around the Loop to generate funds that will catalyze investment on Chicago’s South, Southwest, and West Sides. The focus of the Neighborhood Opportunity Fund is to create and reinforce inclusively vibrant commercial corridors in our neighborhoods, with grant funding to support small business and cultural projects by funding real estate construction and rehabilitation costs.

For additional information about NOF, please visit the [program’s website](#).

### **II. Objectives for Technical Assistance**

Throughout the history of the NOF program, two common barriers have prevented project completion for some participants:

- 1.Lack of access to a Construction Project Manager
- 2.Lack of access to an Architect

To address these issues, the NOF program is seeking to engage Approved TA Providers in these two critical areas. The goal is to offer NOF participants the support they need to successfully navigate construction and design challenges, ensuring that projects are completed on time, on budget, and in compliance with regulatory requirements.

After reviewing applications, SomerCor (working with the City of Chicago) will create a list of Approved TA Providers for both Construction Project Managers and Architects. The City will share the final Approved TA Provider List with NOF participants and may facilitate introductions between NOF participants and Approved TA Providers. The City will not recommend or endorse any one Approved TA Provider, and, ultimately, NOF participants will select the Approved TA Provider.

### **III. Approved TA Provider Roles**

## CONSTRUCTION PROJECT MANAGER

**Qualifications:** Construction Project Managers must be reputable professionals with demonstrated experience in meeting deadlines, managing construction projects, including knowledge of the permitting process and project management best practices.

### Services Provided:

If selected by a NOF participant, the Construction Project Manager will be responsible for:

- **Soliciting Proposals:** Coordinating the solicitation of architectural and design proposals, as required, and soliciting construction bids for the full scope of the project.
- **Bid Evaluation:** Reviewing bids, pricing, and evaluating them based on architectural designs and current market prices for labor and materials, as required.
- **Contractor Selection:** Assisting with contractor selection, negotiating pricing, finalizing contract terms, and developing a construction schedule.
- **Project Oversight:** Managing the construction process to ensure that the project stays on schedule and within budget and liaising with contractors as necessary.
- **Payment Documentation:** Organizing payment documentation, including sworn statements, lien waivers, and invoices.
- **Permitting Assistance:** Navigating the permitting process, ensuring compliance with all regulatory requirements, scheduling inspections, and responding to permit review comments in a timely manner.

## ARCHITECTS

**Qualifications:** Architects must be licensed, insured, and qualified professionals with a proven track record in architectural design and construction project management, especially staying on schedule. Experience in navigating the permitting process is highly preferred.

### Services Provided:

If selected by a NOF participant, the Architect will be responsible for:

- **Design Drawings:** Producing architectural drawings, including schematic designs, renderings, and permit-ready construction drawings, as well as any revisions required by the City of Chicago or the client.
- **Permitting Support:** Assisting with the permitting process, including submission of drawings to the City of Chicago for review and approval, and responding to permit review comments in a timely manner.
- **Project Management (Optional):** Offering project management services, including bid-letting and organization of project payment documents (optional, based on the project scope).

## IV. Fees for Technical Assistance Services

Selection as an Approved TA Provider does not guarantee compensation. After an NOF participant is awarded a grant, they will select an Approved TA Provider and negotiate a scope of work. Compensation for services rendered will be determined on a case-by-case basis, depending on the scale and complexity of the project.

**Fee Structure:**

- Hourly Rates: TA Providers will be compensated based on hourly rates, subject to an estimated time commitment for specific project milestones.
- Maximum Funding Cap: Fees for technical assistance services will be capped at 20% of the approved NOF grant amount, or \$50,000, whichever is less. The \$50,000 cap is separate from the \$250,000 grant maximum.
- Payment Milestones: Payments will be made based on the completion of defined milestones, and the billing structure will align with the agreed-upon scope of services.

**Milestones for Construction Project Manager:**

- Bid Letting: When the NOF participant has received at least two competitive bids from contractors and has selected a contractor.
- Permit Issuance and “Groundbreaking”: When all required approvals are obtained, and construction begins.
- Project Completion: When the project has passed all inspections, and payment documentation (including sworn statements and lien waivers) has been collected.

**Milestones for Architect:**

- Renderings and Schematic Drawings: The creation of initial design concepts and functional layouts.
- Permit-Ready Drawings: When the architectural drawings are finalized and submitted for permitting.
- Permit Issuance: After successful submission and approval of plans by the City of Chicago.
- Project Completion (Optional): When the project is completed, and inspections are passed.

**Determining Scope of Services:**

The scope of services for each project will be negotiated between the NOF participant and the selected TA Provider based on the individual project requirements. The TA Provider will document the services provided in accordance with the agreed-upon scope.

**Contracting and Invoicing:**

Before any work begins, the NOF participant and the TA Provider will enter into a contractual agreement that is approved by the City of Chicago. All invoices must be supported by documentation of the work performed. Payments will be made by SomerCor on behalf of the City of Chicago, with up to three disbursements per engagement.

**Partial Payments for Stalled or Discontinued Projects:**

If a project is halted or discontinued by the NOF participant, the TA Provider may apply for a partial payment for services rendered up to the point of cancellation. The partial payment may not exceed 30% of

the milestone payment and may be granted, once reviewed and approved by SomerCor, under the following conditions:

1. The NOF participant formally decides to discontinue the project.
2. The Approved TA Provider was not listed as a reason for the NOF participant in arriving at their decision.
3. The work performed by the Approved TA Provider can be substantiated.

## V. Approved TA Provider Application

Responses are to be submitted electronically via Submittable, no other types of submissions will be accepted. Responses must be submitted not later than 5:00 PM on 02/28/2025. For additional questions please contact:

### Reuben Waddy

SomerCor 504, Inc.

209 S LaSalle St

Chicago, IL 60604

Contact: [rwaddy@somercor.com](mailto:rwaddy@somercor.com)

### A) Applicant Profile:

The following identifying information should be provided at the beginning of your response:

- Business Name
- Address
- Website
- Lead contact's name and title (person responsible for managing these TA services)
- Phone and email information
- Number of years in business
- Total number of staff available to provide these specific TA Provider services
- Ethnicity/race and gender of business owner

### B) Existing City Contracts:

If the Applicant has existing contracts or outstanding bid applications with a City of Chicago Department or Sister Agency, please provide a list of such contracts or applications.

### C) Category of Services:

Please identify the Approved TA Provider role(s)\* (Construction Project Manager and/or Architect) for which you intend to apply.

*\*A provider can qualify for both, but applicants are encouraged to select the service they are most qualified or experienced to offer. If both services are selected, you must provide the materials relevant to both roles; your application for each role will be evaluated separately.*

### D) Proposal Narrative:

Applicants must submit their answers to each of the following questions and include attachments/exhibits, where necessary, to be considered. Applicants should convey how their technical assistance services will benefit NOF participants in a cost-effective and timely manner appropriate to the goals of the Neighborhood Opportunity Fund. *Please be specific in relating your answers to your desired service provider role.*

#### 1. Statement of Interest

Provide a brief introduction to your business/organization, main professional services offered, and areas of expertise. Include a statement that details why your business is interested in serving as an Approved TA Provider.

## **2. Experience**

Provide **2-3 examples** of previous experiences providing architectural or construction management technical assistance services. If you have neither, please describe experiences that you've had which you believe are comparable and why you believe they are comparable. Please be specific.

**Each example should include:**

- (1) a summary of services provided,
- (2) **for construction project management examples: the projected construction timeline for the project and how well the project adhered to that schedule,**
- (3) **for architectural examples: the** timeline for producing architectural drawings and the turnaround time for permit issuance. If relevant, please also describe how you helped the client manage their project up to completion,
- (3) cost/fee charged for services, and
- (4) at least one reference, per example, with phone and email contact information.

Within the response to this question, please identify if your business/organization has direct experience engaging with businesses in low- to moderate-income, urban commercial districts and particularly experience within the South, Southwest and West sides of Chicago.

## **3. Qualifications of Key Personnel**

Provide a description of your organizational structure, and a list of and resumes for qualified staff or independent contractors that will be responsible for providing technical assistance services for these projects. Please describe how you will allocate staff (and their time) and any other resources if selected for a contract with a NOF participant.

## **4. Strategy for TA Service Delivery**

Provide a description of what your typical approaches will be for service provision on NOF Finalist projects. Consider answering the following questions in developing your response:

- (1) **For Construction Project Managers:** What techniques will you use to solicit bids for NOF participants? How will you evaluate and compare bids and the firms which provide them? How will you ensure architects and contractors adhere to schedules and the construction project remains on schedule, as possible?
- (2) **For Architects:** What techniques will you use to work with NOF participants in ensuring their vision of the project is maximized? How will you help them produce renderings, schematics, and permit-ready drawings in a timely fashion. What strategies will you employ during the permit review process and preventing it from taking a long time to complete? If you're also acting as a project manager, see the prompt above "For Construction Project Managers."

## **5. Additional Information**

Please include any other relevant information you believe is essential to the evaluation of your proposal.

**E) Minority, Women, and Veteran Business Enterprises Commitment (optional)**

Applicant may submit a copy of their current City of Chicago and/or Cook County MBE/WBE Certification Letter evidencing your company is certified as an MBE and/or WBE.

**F) Final Certifications:** In your response, please indicate a “Yes” or “No” response to each of these four certifications. You may type the exact copy followed by “Yes” or “No” or re-write the statement to indicate the affirmative or negative response (e.g. “Our staff is willing and able...”).

- a. Are you and/or your staff willing and able to travel to any and all of the NOF participant locations in order to provide technical assistance directly to the NOF participants in their preferred location?
- b. Is your organization able to start providing services immediately upon their addition to the list of Approved TA Providers?
- c. Is there any pending litigation against your organization or its principals in courts situated within Illinois within the past five years?
  - i. If you answered “Yes,” please provide details on court cases
- d. Do you and your staff acknowledge that it is prohibited to provide gifts to NOF participants or to accept gifts from them (e.g. free meals or merchandise)?

**G) Attachment A – Schedule of Fees for Technical Assistance (Required):**

Please provide a cost breakdown of the technical assistance services your organization will provide if selected. If there are different fees based on the type of service, phase of the NOF project (identifiable by a certain milestone as discussed in Section IV of this RFQ), or size of the NOF project, please be specific.

Please keep in mind that the maximum fee amount per project will be 20% of the NOF grant amount or \$50,000, whichever is less. The fees per project need to be justified on the basis of an anticipated time commitment (per milestone). Furthermore, an Approved TA Provider can only submit up to three (3) invoices per NOF project and each invoice should be tied to an identifiable milestone for that project.

The suggested milestones outlined in Section IV of this RFQ should be used as a baseline in developing responses. We realize each NOF project is unique in terms of its scope as well as the amount of Technical Assistance required (e.g. some NOF participants will require more time commitment to prepare for submitting a loan application than others), so some projects will have different time commitments per milestone or different milestones altogether.

## **VI. The Selection Process**

All applications will be reviewed for completeness, and incomplete or non-responsive applications will be negatively considered. Scoring of Approved TA Provider applications will be based on the following points schedule:

- I. **Relevant work experience:** 40 points
- II. **Qualifications of key personnel:** 30 points
- III. **Strategy for TA Service Delivery:** 30 points

**Maximum number of points: 100.**

All applications will be scored using the above scoring framework and each application will be reviewed by at least two reviewers. In some cases, a phone interview may be requested as part of the selection process.

## **VII. Reporting and Evaluation Requirements**

NOF participants will complete satisfaction surveys after the completion of their projects regarding their use of an Approved TA Provider, if applicable. The results of these surveys along with an evaluation of outcomes observed on projects where an Approved TA Provider was used (e.g. completion of projects, expediency of project relative to its deadlines) will be assessed periodically.

Approved TA Providers will be responsible for submitting annual internal evaluation reports. These reports should contain a description of the technical assistance provided to NOF participants within the reporting period, as well as the key quantitative and qualitative outcomes covered in this solicitation request.

If NOF participants report having an unsatisfactory experience working with an Approved TA Provider and the objectives of their contract were not achieved, the Approved TA Provider may be removed from the Approved TA Provider list.

**Please note:** Approved TA Providers will not be removed from the Approved TA Provider List solely because an NOF participant wasn't able to secure drawings or a construction project wasn't completed. The full context of the engagement and the challenges of the particular project would be considered.

## **VIII. Calendar of Next Steps for Respondents to RFQ**

- (1) RFP Issue date: The RFP will be issued via Submittable.  
**When: January 24, 2025**
- (2) **Pre-submission conference call:** A virtual call will be held to address any questions that respondents may have regarding the RFQ.  
**When: January 24, 2025**
- (3) **Deadline to submit an application to become an Approved TA Provider for the NOF Program:** This will be the deadline to submit an application. The deadline has been selected to ensure this list will be available for the next funding round of the NOF Program.  
**When: February 28, 2025**
- (4) **Anticipated date for decisions regarding an Approved TA Provider List:** This will be the date by which all applicants will receive a response regarding their selection or non-selection for the Approved TA Provider list.  
**When: March 31, 2025**