



Housing Authority of the City of Columbia, Missouri

201 Switzler Street, Columbia MO 65203

Office: (573) 443-2556 ♦ Fax: (573) 443-0051 ♦ TTY: (800) 735-2966 ♦ www.ColumbiaHA.com

Open Meeting Notice CHA Board of Commissioners Meetings

Date: Wednesday, May 20, 2026

Time: 5:30 p.m.

Place: Columbia Housing Authority, 201 Switzler St.

- I. Call to Order/Introductions
- II. Roll Call
- III. Adoption of Agenda
- IV. Approval of Minutes
- V. Commissioner Comment
- VI. Public Comment (Limited to 5 minutes per speaker)

RESOLUTIONS

- VII. **Resolution 3019:** Authorizing the Chief Executive Officer of the Housing Authority of the City of Columbia to execute an Agreement to Enter into a Housing Assistance Payment Contract (AHAP) prior to construction, and a housing assistance payment (HAP) contract upon construction completion and final inspection.
- VIII. **CEO Report:** CHA 5-Year PHA Plan Update, First Quarter AP Batch Review
- IX. **Monthly Financial Report**
- X. **Department Reports:** Safety, Human Resources, Affordable Housing Development and Compliance, Facilities and Modernization, Resident Services, Affordable Housing Operations, Housing Choice Voucher Program
- XI. Current Events
- XII. Public Comment (Limited to 5 minutes per speaker)
- XIII. Adjournment

If you wish to participate in the meeting and require specific accommodations or services related to disability, please contact Danielle Gill, Administrative Assistant at (573) 554-7020 , TTY Relay 800.735.2966, or dgill@columbiaha.com, 1-business day before the meeting.

Media Contact: Randy Cole, CEO
Phone: (573) 443-2556
E-mail: rcole@columbiaha.com

A complete agenda packet is available for review at all CHA offices during regular business hours and posted on the CHA web site at: www.ColumbiaHA.com.



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HOUSING AUTHORITY OF THE CITY OF COLUMBIA, MISSOURI BOARD OF COMMISSIONERS MEETING APRIL 15, 2026, BOARD MEETING MINUTES

I. Call to Order:

The Board of Commissioners of the Housing Authority of the City of Columbia, Missouri (CHA) met in open session on April 15, 2026, in the Training Room of the Columbia Housing Authority Administration Building, 201 Switzler St., Columbia, Missouri 65203. Mr. Hutton, Chair, called the meeting to order at 5:32 p.m.

II. Roll Call:

Present:

Bob Hutton, Chair
Rigel Oliveri, Commissioner
Steve Calloway, Commissioner, via Zoom
Steve Smith, Commissioner
Anthony Allen, Commissioner

CHA Staff: Randy Cole, CEO
Mary Ann Gelina, Director of Affordable Housing Development
David Steffes, Chief Financial Officer
Danielle Gill, Executive Assistant

RubinBrown: Renita Duncan
Tanner Sutton
Brandi Lawyer, via Zoom

III. Adoption of Agenda:

Mr. Hutton called for a motion to approve the agenda. Ms. Oliveri made a motion to approve the agenda. A second was made by Mr. Smith. All Commissioners voted "aye". Mr. Hutton declared the agenda adopted.

IV. Approval of the Minutes

Approval of March 18, 2026 Open Meeting Minutes:

Mr. Hutton called for a motion to approve the minutes from the open meeting that occurred on March 18, 2026. Mr. Smith made a motion to approve the minutes. A second was made by Ms. Oliveri. All Commissioners voted "aye". Mr. Hutton declared the minutes adopted.

V. Commissioner Comment

None.

VI. Public Comment

None.

VII. RubinBrown Presentation of the FY 2025 LIHTC Audits

Mr. Cole introduced the auditors and provided an overview of the audits. He reported that all of CHA's audits received unmodified, clean opinions with no concerns noted. Mr. Cole stated that Stuart Parker, Oak Towers, and Bear Creek are CHA's "anchor" properties, while the smaller properties require greater fiscal discipline. He further noted that the audits show that CHA is sufficiently cash-flow positive, with the exception of Bryant Walkway I, which required an operating loan due to increased insurance costs. Since rebidding CHA's insurance, all properties have seen trend with cash-flow positivity.

Ms. Lawyer noted that CHA's two new projects, Kinney Point and Park Avenue, have yet to undergo cost certification and audit. Ms. Lawyer shared that Kinney Point will be finalized shortly, and Park Avenue will likely undergo cost certification and an audit next year.

Ms. Duncan provided a general overview of their agencywide auditing process. Mr. Hutton stated that the Section 8 audit was in its final stages and that RubinBrown is now beginning to work on CBDG and ARPA audits. Ms. Duncan stated that the financial statement audit is due June 1, 2026, so they would finish that first, and then the audit of the federal funding is due on September 30, 2026. Ms. Duncan stated that RubinBrown will be present at the August 2026 Board Meeting.

VIII. Resolution 3015: Accepting the Audited Financial Statements of the Mid-Missouri Veterans Housing Development Group, LP, the Stuart Parker Housing Development Group, LP, the Bear Creek Housing Development Group, LP, the Oak Towers Housing Development Group, LP, the Bryant Walkway Housing Development Group, LP, and the Bryant Walkway II Housing Development Group, LP for Calendar Year Ending December 31, 2025.

Mr. Calloway noted that there is a slight difference in the partners' interests in profits and losses on page 10 versus page 17 of Bear Creek's audit report. Mr. Smith also inquired about any audit firm policies related to limitations of services to one entity. Mr. Cole stated that he would inquire about these items and clarify it for the Board.

Mr. Hutton asked for a motion to approve Resolution 3015. A motion to approve the resolution was made by Mr. Calloway. Mr. Allen seconded the motion.

Yes: Smith, Allen, Oliveri, Hutton, Calloway

IX. Resolution 3016: Authorizing the Housing Authority of the City of Columbia, Missouri to Issue Its Multifamily Housing Revenue Bonds (Providence Walkway Apartments) on Behalf of Providence Walkway Housing Development Group, LP to Provide Funds to Finance a Portion of the Costs of the Acquisition, Rehabilitation, and Construction of a 25-Unit Housing Project; Authorizing and Approving Certain Documents in Connection with the Issuance of the Bonds; and Authorizing Certain Other Actions in Connection with the Issuance of the Bonds.

Mr. Cole stated that Resolution 3016 would authorize up to \$6.5 million in bonds for the Providence Walkway project. Mr. Cole noted that the pro forma has \$5.8 million, and while CHA doesn't foresee exceeding \$5.8 million, CHA would like the ability to issue more bonds if needed. Mr. Cole shared that he believes this is a necessary administrative step to getting CHA closer to closing on the Providence Walkway project.

Mr. Hutton asked for a motion to approve Resolution 3016. A motion to approve the resolution was made by Mr. Calloway. Mr. Allen seconded the motion.

Yes: Smith, Allen, Oliveri, Hutton, Calloway

X. Resolution 3017: To Approve the Submission of Applications to the City of Columbia's FY 2027 Community Development Block Grant (CDBG) and HOME Investment Partnerships Program.

Mr. Cole stated that CHA would like to submit an application by May 1, 2026 for CDBG and HOME funds. Mr. Cole noted that the HOME funds allow CHA to provide additional vouchers. Mr. Cole stated that CHA is asking for \$300,000 in additional funds, which is a decrease from what CHA was awarded last year, but that the amount would allow CHA to sustain the program. Mr. Cole shared that the CDBG funds would go towards CHA's new project at 507 Park Avenue. Mr. Cole then further discussed the lead time and duration of development from concept to implementation, as well as the importance of continued development for CHA's mission, financial growth and impact on the community.

Mr. Hutton asked for a motion to approve Resolution 3017. A motion to approve the resolution was made by Mr. Calloway. Mr. Allen seconded the motion.

Yes: Smith, Allen, Oliveri, Hutton, Calloway

REPORTS

XI. CEO Report: 5-Year PHA Plan Updates

Mr. Cole provided updates on planning efforts and stated that CHA is currently conducting a resident survey to gather feedback on general services and gauge interest in certain online features and service options.

XII. Monthly Financial Report

Mr. Steffes noted that CHA's net income in February 2026 before depreciation and amortization was \$63,000. Mr. Steffes stated that while operationally, CHA is in the positive, LIHTC is below budget. Mr. Steffes indicated that revenue at Oak Towers is down 4%, likely due to delays in Social Security payments, but that revenue is starting to flow back in. Mr. Steffes pointed out that Bear Creek is the outlier, being 21% over budget. Mr. Steffes said that this was due to a water main break and that it will be rectified.

XIII. Department Reports Affordable Housing Operations, Facilities and Modernization, Affordable Housing Development, Resident Services, HCV Programs, Safety, Human Resources

Affordable Housing Development: Ms. Gelina stated that Kinney Point is in the stabilization phase and that her team is finishing up the cost certification. Ms. Gelina hopes to have the 8609 forms issued by June. Ms. Gelina estimates that the Boone County ARPA funds will be drawn by May 2026 and that CHA will start drawing down City funding. Ms. Gelina stated that CHA is working on meeting the County and City deadlines for ARPA funding for Blind Boone, and that CHA hopes to close in Fall 2026.

Affordable Housing Operations: Mr. Cole stated that CHA's PBV units are at 96% occupancy. Mr. Cole noted that although Kinney Point lease up pulled some staffing resources away from other LIHTCs, the numbers demonstrate positive gains. Mr. Cole stated that Bear Creek hired a new property manager, Chanee Edwards, and that CHA is seeing rent collections increase at this property.

Facilities and Modernization: Mr. Cole stated that there was a water main break at Bear Creek and a sewer line collapse at 207 Park Avenue, which have been handled. Mr. Cole said that the roofs at Bear Creek are due to be completed by the end of the week.

Resident Services: Mr. Cole noted that Resident Services was awarded a \$2,500 grant for Juneteenth. Mr. Cole shared that MAP Employee Michaela Flores was recognized in Washington D.C. for being one of the top program staff in the country.

HCV: Mr. Cole stated that the HCV Team has sent out all of the payment standard corrections and that they have been working closely with RubinBrown.

Human Resources: Mr. Cole stated that Human Resources has a few open MAP positions. Mr. Cole shared that Nate Hoemann has been putting together an employee engagement survey. Mr. Cole noted that CHA is considering rebidding employee health insurance and retirement because of various changes with CHA's benefits vendors, and the duration of time since previous bids.

Safety: Mr. Cole stated that Safety did not receive any major or abnormal calls in the past month.

XIV. Current Events

Mr. Cole reviewed the current events, including CHA's celebrations for its 70th Anniversary. Mr. Cole shared that Veterans United awarded CHA \$150,000 for furniture and that volunteers from Veterans United would come at the end of May 2026 to assemble the furniture.

XV. Public Comment
None.

XVI. Adjournment

Mr. Hutton called for a motion to adjourn the meeting. A motion was made by Mr. Smith, seconded by Ms. Oliveri. Mr. Hutton called the meeting adjourned at 6:49 p.m.

Bob Hutton, Chair

Date

Randall Cole, Chief Executive Officer

Date

Certification of Public Notice

I, Randall Cole, Chief Executive Officer of the Housing Authority of the City of Columbia, Missouri, do hereby certify that on April 10, 2026, I posted public notice of the April 15, 2026, Board of Commissioners Meeting and distributed copies of the notice and agenda to the Board of Commissioners and the local media. The meeting notice and agenda was also distributed to the public upon request.

The complete agenda packet was available for review at all CHA offices during regular business hours and posted on the CHA web site at: www.ColumbiaHA.com.

Randall Cole, Chief Executive Officer

Date



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HOUSING AUTHORITY OF THE CITY OF COLUMBIA, MISSOURI BOARD OF COMMISSIONERS MEETING MAY 6, 2026 2026, BOARD MEETING MINUTES

I. Call to Order:

The Board of Commissioners of the Housing Authority of the City of Columbia, Missouri (CHA) met in open session on May 6, 2026, in the Training Room of the Columbia Housing Authority Administration Building, 201 Switzler St., Columbia, Missouri 65203. Mr. Hutton, Chair, called the meeting to order at 10:01 a.m.

II. Roll Call:

Present:

Bob Hutton, Chair
Rigel Oliveri, Commissioner, via Zoom
Steve Calloway, Commissioner, via Zoom
Steve Smith, Commissioner, via Zoom
Anthony Allen, Commissioner

CHA Staff: Randy Cole, CEO
David Steffes, Chief Financial Officer
Danielle Gill, Executive Assistant

III. Adoption of Agenda:

Mr. Hutton called for a motion to approve the agenda. Mr. Smith made a motion to approve the agenda. The motion was seconded by Mr. Calloway. All Commissioners voted "aye". Mr. Hutton declared the agenda adopted.

IV. Commissioner Comment

None.

V. Public Comment

None.

VI. Resolution 3018: Authorizing the Chief Executive Officer to Execute all Necessary Documents to increase the Columbia Housing Authority's Line of Credit with First Mid Bank and Trust.

Mr. Cole introduced a resolution to increase Columbia Housing Authority's line of credit with First Mid Bank and Trust to \$587,000. Mr. Cole stated that CHA must temporarily fund capital projects, such as the Bear Creek roof replacement, before being reimbursed by Boone County. Mr. Cole stated that the line of credit would be utilized to maintain CHA's cash reserves prior to being

reimbursed by Boone County. Mr. Cole shared the terms of the loan, including that the interest rate would be the WSJ Prime less 0.50%, which floats daily.

Mr. Hutton asked for a motion to approve Resolution 3018. A motion to approve the resolution was made by Mr. Smith. Ms. Oliveri seconded the motion.

Yes: Allen, Hutton, Smith, Calloway, Oliveri

VII. Public Comment

None.

VIII. Adjournment

Mr. Hutton called for a motion to adjourn the meeting. A motion was made by Ms. Oliveri, seconded by Mr. Calloway. Mr. Hutton called the meeting adjourned at 10:11 a.m.

Bob Hutton, Chair

Date

Randall Cole, Chief Executive Officer

Date

Certification of Public Notice

I, Randall Cole, Chief Executive Officer of the Housing Authority of the City of Columbia, Missouri, do hereby certify that on April 10, 2026, I posted public notice of the May 6, 2026, Board of Commissioners Meeting and distributed copies of the notice and agenda to the Board of Commissioners and the local media. The meeting notice and agenda was also distributed to the public upon request.

The complete agenda packet was available for review at all CHA offices during regular business hours and posted on the CHA web site at: www.ColumbiaHA.com.

Randall Cole, Chief Executive Officer

Date



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Department Source: CEO

To: CHA Board of Commissioners

From: CEO & Staff

CHA Board of Commissioners Meeting Date: May 20, 2026

Re: Resolution 3019: A Resolution Authorizing the Chief Executive Officer of the Housing Authority of the City of Columbia to execute an Agreement to Enter into a Housing Assistance Payments Contract (AHAP) prior to construction, and a Housing Assistance Payment (HAP) contract upon construction completion and final inspection.

Executive Summary

Resolution 3019 authorizes the Chief Executive Officer to execute an Agreement to Enter into a Housing Assistance Payment Contract (AHAP) and subsequent Housing Assistance Payment (HAP) Contract for two (2) new non-RAD Project Based Voucher (PBV) units at the Providence Walkway Apartments project

Discussion

Providence Walkway Apartments is a 25-unit PBV development currently advancing through HUD RAD conversion and redevelopment activities. CHA has recently completed or advanced multiple implementation actions for the project, including environmental review activities, subsidy layering review coordination, RAD transaction preparation, early start activity coordination, and financing-related approvals.

The two additional non-RAD PBV units require execution of an AHAP prior to construction and execution of a HAP contract following construction completion and final inspection in accordance with HUD PBV requirements. HUD compliance requirements necessary for contract execution, including PHA Plan identification, environmental clearance, and subsidy layering review requirements, have been completed or are in process.

Recommended Commission Action

Approve Resolution #3019 authorizing the Chief Executive Officer to allocate two (2) PBVs to the Providence Walkway Apartments project for an initial twenty (20) year term and to execute the required AHAP and HAP contracts associated with the two non-RAD PBV units.



Housing Authority of the City of Columbia, Missouri

Board Resolution

RESOLUTION #3019

A Resolution Authorizing the Chief Executive Officer of the Housing Authority of the City of Columbia to execute an Agreement to Enter into a Housing Assistance Payment Contract (AHAP) prior to construction, and a housing assistance payment (HAP) contract upon construction completion and final inspection.

A Resolution Authorizing the Chief Executive Officer of the Housing Authority of the City of Columbia to execute an Agreement to Enter into a Housing Assistance Payment Contract (AHAP) prior to construction, and a Housing Assistance Payment (HAP) Contract upon construction completion and final inspection.

WHEREAS, the Housing Authority of the City of Columbia is developing the Providence Walkway Apartments project, which includes twenty-five (25) Project Based Voucher (PBV) units; and

WHEREAS, twenty-three (23) of the PBV units are being converted through the U.S. Department of Housing and Urban Development's Rental Assistance Demonstration (RAD) program and do not require execution of an Agreement to Enter into a Housing Assistance Payment Contract (AHAP); and

WHEREAS, the remaining two (2) PBV units are new non-RAD PBV units requiring execution of an Agreement to Enter into a Housing Assistance Payment Contract (AHAP) prior to construction and a Housing Assistance Payment (HAP) Contract upon completion and final inspection; and

WHEREAS, the Housing Authority of the City of Columbia has completed or is completing compliance requirements stipulated by the U.S. Department of Housing and Urban Development (HUD) necessary to authorize the award of an AHAP contract and HAP contract, including identification of the PBV units within the PHA Plan, environmental clearance and release of funds in accordance with NEPA Part 58, and HUD subsidy layering review requirements.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Housing Authority of the City of Columbia, Missouri adopts Resolution #3019 authorizing the Chief Executive Officer to allocate two (2) Project Based Vouchers to the Providence Walkway Apartments project for an initial term of twenty (20) years.

FURTHER BE IT RESOLVED that the Chief Executive Officer is hereby authorized to execute an Agreement to Enter into a Housing Assistance Payment Contract (AHAP) prior to construction, and a Housing Assistance Payment (HAP) Contract once construction is complete and the project inspected.

PASSED by the governing body of the Housing Authority of the City of Columbia, Missouri, this 20th day of May, 2026.

Bob Hutton, Chairman

Randy Cole, Secretary

Adopted May 20, 2026



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Department Source: CEO

To: CHA Board of Commissioners

From: CEO & Staff

CHA Board of Commissioners Meeting Date: May 20, 2026

Re: CHA 5-Year PHA Plan Update

Executive Summary

The Columbia Housing Authority is required to submit a PHA Plan consisting of a Five-Year Strategic Plan and Annual Plan to qualify for programs funded through the U.S. Department of Housing and Urban Development. The PHA Plan serves as a comprehensive guide to public housing agency (PHA) policies, programs, operations, and strategies for meeting local housing needs and goals. CHA's current Five-Year Strategic Plan covers FY 2022 through FY 2026; therefore, CHA is required to formulate and adopt a new plan by the October 2026 CHA Board of Commissioners meeting. This memo provides an update regarding planning efforts, organizational engagement activities, and several operational and governance initiatives currently underway.

Discussion

CHA has completed the following items to-date:

- ✓ January 21st: CHA Board of Commissioners, Process Overview and Commissioner Feedback.
- ✓ February 11th: Local Funder Roundtable and SWOT Analysis. (City-Housing, City-Health Dept, County Community Services, United Way, Veterans United Foundation, WGL Foundation).
- March-April: CHA Resident Survey. - In process
- March-April: Employee Engagement Survey. – In process
- March 18th: Board Meeting Topic: Vision, Mission and Values. – To Occur at June meeting.
- ✓ April 15th: CHA Open House to Celebrate 70-Year Anniversary and Feedback from Community Partners
- ✓ April 23rd: Resident Advisory Board Meeting (RAB)-Engagement Session.
- May 21st: CHA Senior Staff: SWOT Analysis, Mission and Values Review.
- June 4th: CHA Directors Formulate “draft” strategic objectives/goals.
- June 17th: CHA Board of Commissioners Annual Meeting-Mission, Vision & Values. Strategic Goals
- August 31st: 45-Day PHA Plan Notice posted for draft plan.
- September 24th: Resident Advisory Board Meeting to review draft plan.
- October 21st: CHA Board of Commissioners consideration of the PHA Plan.

First Quarter AP Batch Review and Continuous Improvement

During April and May 2026, CHA implemented its initial First Quarter Accounts Payable (AP) Batch Review process associated with transactions exceeding procurement policy thresholds. As part of the process, the Board Chair identified 17 transactions for supplemental review. CHA's Chief Financial Officer compiled supporting procurement and payment documentation, and the CEO and CFO jointly reviewed each transaction utilizing a standardized internal review checklist. The compiled materials and supporting documentation were subsequently provided back to the Board Chair as part of the new oversight process.



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This represented CHA's first implementation cycle of the enhanced review framework and is intended to further enhance long-term governance transparency, financial oversight, and institutional accountability.

Initial observations indicated the procurement and payment files reviewed were supportable and defensible from an audit and documentation perspective. The review process also identified some opportunities for continued operational refinement, including emergency purchase documentation practices, procurement consistency, and additional process standardization opportunities. CHA leadership intends to utilize these observations to continue strengthening internal controls, operational clarity, and enduring institutional structure over time.

Recommended Commission Action

Review and consider the report.



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Department Source: CEO

To: CHA Board of Commissioners

From: CEO & Staff

CHA Board of Commissioners Meeting Date: 5/20/2026

Re: CHA Director Reports

Executive Summary

This memo provides a monthly account of functions and activities of CHA Departments.

Discussion

Summary:

This report summarizes operations across all departments. The financial report is in a standalone monthly finance report. There are steady operations across all departments with continued development progress on milestones, continued addressing of maintenance and management of construction project sites, operating of properties, maintenance of voucher programs, the provision of services to residents and ensuring safety on CHA property. Each property is performing well with additional leasing efforts focused at Bear Creek and the Bryant Walkway I and II properties.

Affordable Housing Development:

Kinney Point

- Construction bond payoff and permanent loan conversion completed on 5/1/2026.
- Issuance of IRS Form 8609 is projected for June 2026, followed by receipt of the final equity installment and remaining developer fee.

Park Avenue

- Construction continues to progress with minimal delays.
- The 10% test has been completed and submitted to MHDC.
- Of the \$5 million in County ARPA funds, \$379,923.97 remains available to draw. No issues are anticipated in meeting the June 30, 2026 expenditure deadline.
- The next anticipated funding source is the \$2 million City ARPA allocation, which carries an expenditure deadline of 12/31/2026.
- Relocation efforts are underway. Staff is conducting one-on-one meetings with tenants and coordinating unit assignments while ensuring compliance requirements are maintained to preserve eligibility for tax credit funding.

Providence Walkway

- RAD early start has been approved, and the Financing Plan has been submitted for supervisory approval.
- The early start construction contract has been executed, and the team is coordinating with MHDC to schedule the pre-construction meeting.
- MHDC: The Firm Commitment and related exhibits have been executed.
- Due diligence: Weekly calls in process. Submissions are substantially complete, and the team is working toward finalization of legal documents.

Blind Boone Apartments

- RAD: Financing Plan submitted on May 12, 2026.
- MHDC: Coordinating with underwriting to address the remaining comments. Closing is anticipated in September 2026.



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- Construction contract executed and subcontractors have been identified to support compliance with the County ARPA June 30, 2026 expenditure deadline. Submission of the first draw request is anticipated during the third week of May.

Facilities and Modernization:

Maintenance work orders have remained consistent, with no major outliers to report. Staff continue to address preventative maintenance items and remove equipment from buildings slated for demolition.

The Bear Creek ARPA project continues to move forward. All roofs have been completed, and the poles and low-voltage infrastructure for the camera system have been installed.

Park Avenue remains on track with only minor weather delays. Buildings 1, 2, and 7 have slabs in place and are awaiting framing. Buildings 4, 5, and 11 are under roof, with MEP work started in Building 5. Interior work is progressing across several buildings, including drywall mud, paint, trim, cabinets, MEP finishes, and flooring. Siding is complete or nearing completion on Buildings 9, 10, 13, 14, and 15.

Furniture has been received for replacement at Patriot Place. Materials for Blind Boone have also been ordered, with some items already received and stored at Bear Creek and off site with the contractor. All permits for Providence Walkway and Blind Boone development have been approved and picked up.

Resident Services:

Resident Services April 2026 highlights of programs and services are as follows:

- **ROSS Program:**
 - \$15,550 in match dollars earned YTD
- **FSS Program:**
 - 5 new participants enrolled
 - 17,750 in escrow dollars added to participant accounts
 - 1 program graduation participant took home over \$43,000
- **Moving Ahead Program:**
 - Summer enrollment full and waitlist started, over 95 students enrolled for June and July
 - Over 10,000 Out-Of-School programming units completed in April
 - Hosted an Earth Day Family Development Fair
 - Teen Center hosted Saturday programming for teen students and their families
- **HHC Support:**
 - 1,027 case management units of service completed
 - Hosted various resource fairs for residents on site at Bear Creek, Kinney Point, and Stuart Parker
- **ILP Program:**
 - 2,722 case management units of service completed
 - All grant outcomes and units of service for FY2026 have been met
- **ForColumbia**
 - Over 200 volunteers on site at CHA properties working on property beautification and cleanup

Affordable Housing Operations:

In April, seven (7) families moved in, and sixteen (16) families moved out. Of the sixteen (16) families that moved out two (2) households were terminated, two (2) tenants passed away, one (1) tenant moved in with family, two (2) transferred to long term care facilities, one (1) tenant transferred properties, one (1) tenant moved to



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section 8 and seven (7) households moved to the private sector. Out of the 656 LIHTC/PBV units there were thirty-one (31) vacant as of April 30, 2026. This is an occupancy rate of 95%. Fourteen (14) units were vacant over 60 days. Vacancies are higher resulting focus of leasing Kinney Point and purging the Public Housing waitlist so it can be merged with the affordable housing waitlist. Purging the Public Housing waitlist should be completed by mid-April, and it will be marked inactive. Intake staff continue to focus on processing applications to fill vacancies across all properties.

HCV Operations:

HCV staff continued with annual recertifications and maintenance of existing files. Staff are only issuing new vouchers in the Continuum of Care (CoC) Program, TBRA and VASH. All other programs are in the maintenance phase. Additional voucher information by program and departmental updates are as follows:

HCV

- 1,090 Households receiving HCV program assistance

VASH

- 147 households receiving VASH program assistance.
- 122 HCV + 25 PBV (Patriot Place).

Mainstream

- 42 vouchers leased.
- Serves non-elderly disabled.

Continuum of Care

- 35 households receiving COC program assistance.
- Working on utilizing more funding by accepting more agency referrals, we currently have 21 vouchers searching.

Emergency Housing Vouchers

- 32 vouchers leased.
- ARPA funded program is the process of phasing out.

Tenant-Based Rental Assistance

- 5 participants leased.

Additional HCV Updates

- Latawanza Robinson completed HCV Training and received her certificate of completion.
- HUD has just announced 2nd quarter renewals and CHA is on the list.
- TBRA and COC funding increases will allow CHA to assist additional households.
- Project Homeless Connect July 23, 2026, at Mo. United Methodist Church, 204 9th St. Columbia, Mo. 11:00 a.m.-2:00 p.m.

Human Resources & IT:

HR staff completed the following human resources related duties.

- Submitting ACA 1095-C data to IRS.
- Renewed the lease for postage machine.

Staff worked across departments and with CHA's 3rd party network administration to complete the IT set up at Kinney Point building which included the following:

- New internet to meet bandwidth requirements for staffing needs and remote viewing access to cameras.
- Running cabling to provide wired internet connection to offices (in progress).



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- Working with 43Tc to set up networking and firewall equipment (in progress).
- Set up staff offices.

HR also has formulated a draft RFP for CHA employee health insurance brokerage, as noted in at the April CHA Board of Commissioner meeting. An initial draft of the RFP is included in the packet for informational purposes. The HR Manager will be in attendance to assist with answering further questions.

Safety:

Safety-related activity remained generally stable through the first four months of 2026. Columbia Police responses totaled 92 calls in April, compared to 115 in March and below the 2025 monthly average of 109 calls. Fire/EMS responses totaled 78 calls in April, down from 116 in March and aligned with the 2025 average. Oak Towers, Paquin Tower, and Stuart Parker continue to generate the highest volume of routine safety-related activity, while Kinney Point experienced a slight increase in safety reports. Overall, reported incidents and police reports remain generally consistent with prior years and no major trends of concern were identified.

April Notable Safety reports:

Check Welfare	3
Disturbance Persons	5
Lease Violations	7
Trespass warnings	3
Parking violations	3

CHA Safety staff have also made significant progress on implementing new safety reporting software. The Director of CHA Safety will provide an additional detailed overview and timeline for implementation at the May 20th meeting. Screenshots of initial reporting formats can be viewed on the next pages of the report.



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New Software update Go live May 19, 2026

Reviewable Reports (18) Reports To Complete (0)

Show any reports that are prior to my review level.

Report Date	Report Number	Report Type	Incident/Activity	Location	Group Name	Report Recorder	Review Level Name	Review Level
4/15/2026 06:07 PM	2026-043	Incident Report	OTHER	PARK AVE (NEW OLD AM...	COLUMBIA HOUSING AUTHORITY SAFETY	TARA THOMASON	FINAL	1
4/15/2026 06:01 PM	2026-042	Incident Report	ALARM, ALARM, ALARM	PARK AVE (NEW OLD AM...	COLUMBIA HOUSING AUTHORITY SAFETY	KEITH, KEVIN	FINAL	1
4/15/2026 01:45 PM	2026-041	Incident Report	CHECK WELFARE	OAK TOWERS	COLUMBIA HOUSING AUTHORITY SAFETY	KEITH, KEVIN	FINAL	1
4/15/2026 01:33 PM	2026-039	Incident Report	SMOKING VIOLATION	BEAR CREEK	COLUMBIA HOUSING AUTHORITY SAFETY	TARA THOMASON	FINAL	1
4/15/2026 01:27 PM	2026-038	Incident Report	LOCK OUT	PAQUIN TOWERS	COLUMBIA HOUSING AUTHORITY SAFETY	TARA THOMASON	FINAL	1
4/15/2026 01:24 PM	2026-037	Incident Report	DEATH INVESTIGATION	PATRIOT PLACE	COLUMBIA HOUSING AUTHORITY SAFETY	KEITH, KEVIN	FINAL	1
4/15/2026 01:12 PM	2026-035	Incident Report	CHECK WELFARE	OAK TOWERS	COLUMBIA HOUSING AUTHORITY SAFETY	TARA THOMASON	FINAL	1
4/15/2026 12:21 PM	2026-032	Incident Report	TRESPASS WARNING : RENEW ISSUE	BOONE APARTMENTS (N...	COLUMBIA HOUSING AUTHORITY SAFETY	FORCK/OFFICER_JEFF	FINAL	1
4/14/2026 08:57 AM	2026-030	Incident Report	DEATH INVESTIGATION	BOONE APARTMENTS (N...	COLUMBIA HOUSING AUTHORITY SAFETY	FORCK/OFFICER_JEFF	FINAL	1

Messages (0)

Select All Check Messages New Message Delete Checked

No records found.

Tasks (0)

Notes Task Due Date

No records found.

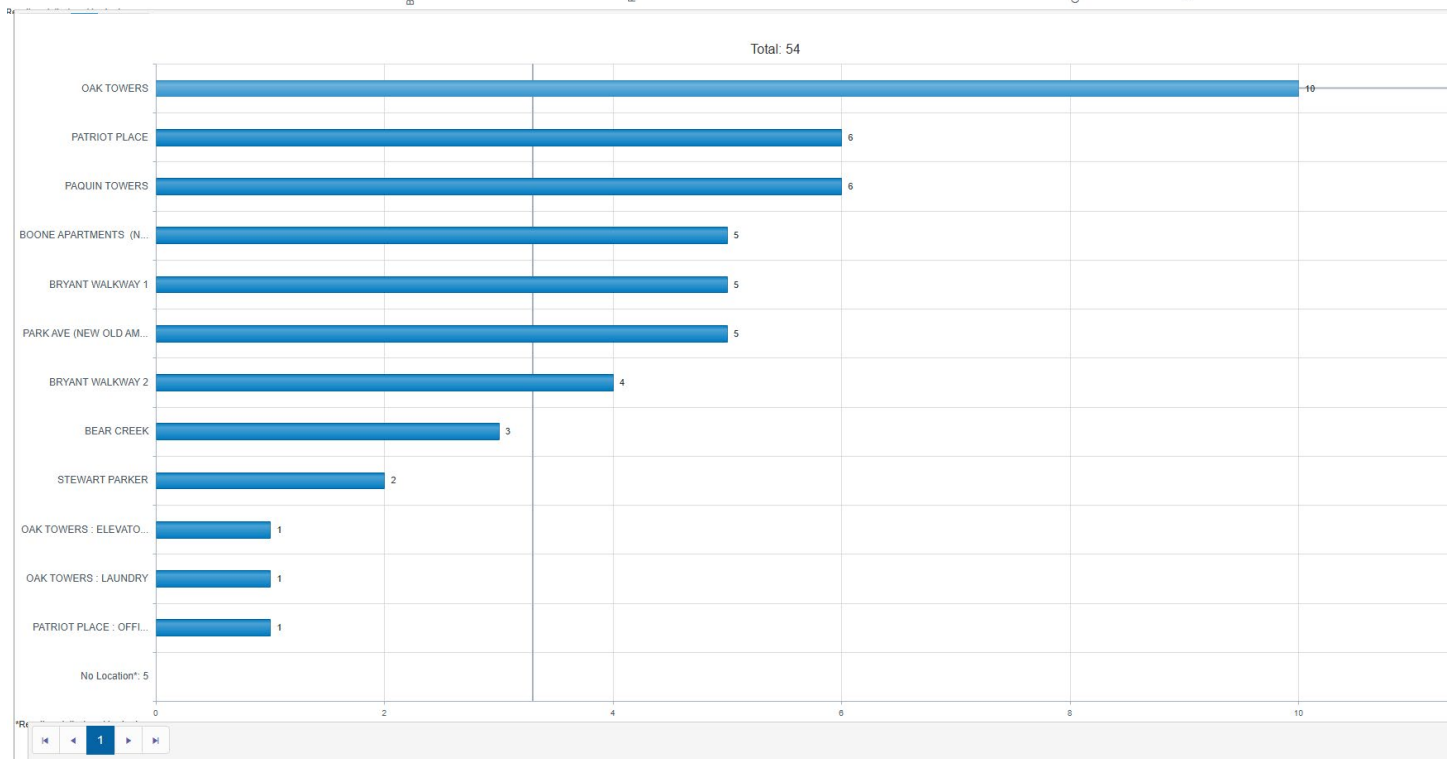
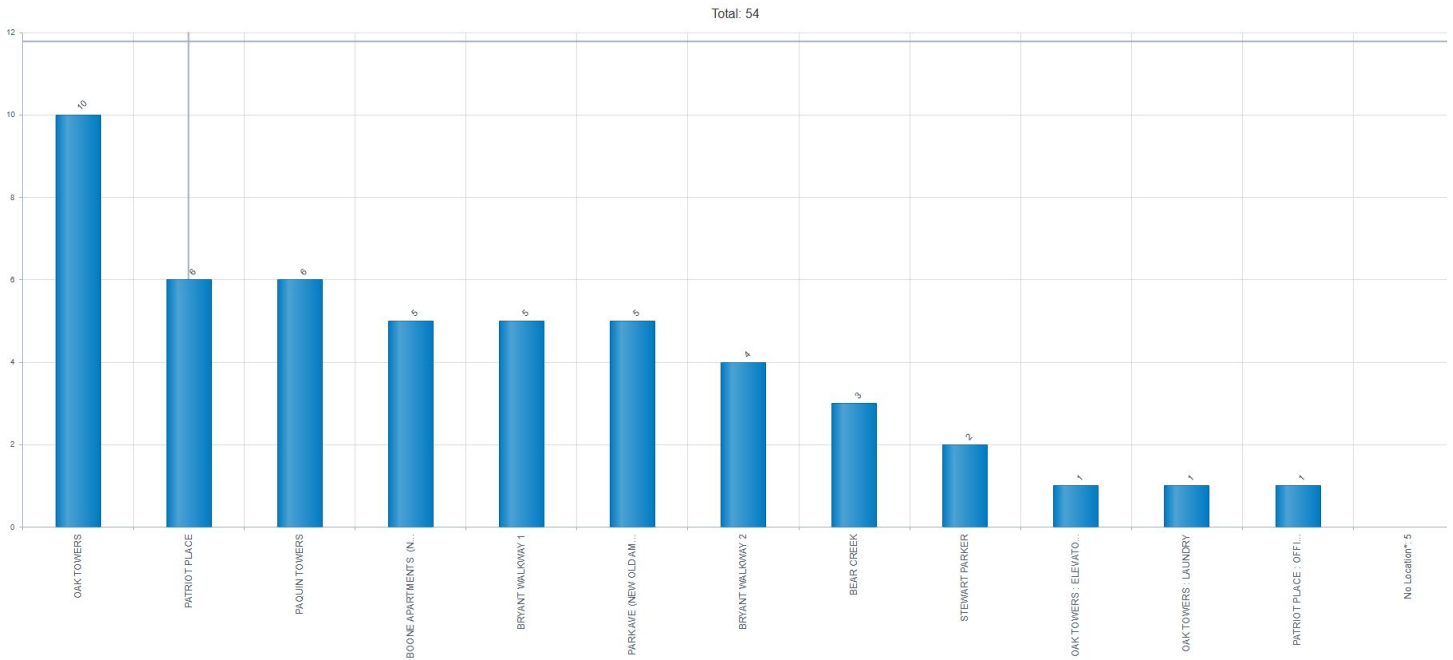
Case/Reference #:	Record Date	Incident Types	Location	Method Of Reporting
BEAR CREEK • Count: 3				
2026-060	4/19/2026	DEATH INVESTIGATION	BEAR CREEK	
2026-046	4/16/2026	OTHER	BEAR CREEK	
2026-039	4/15/2026	SMOKING VIOLATION	BEAR CREEK	
BOONE APARTMENTS (NEW) • Count: 5				
2026-032	4/15/2026	TRESPASS WARNING : RENEW ISSUE	BOONE APARTMENTS (NEW)	
2026-030	4/14/2026	DEATH INVESTIGATION	BOONE APARTMENTS (NEW)	
2026-026	4/13/2026	CHECK WELFARE	BOONE APARTMENTS (NEW)	
2026-026	4/13/2026	ALARM	BOONE APARTMENTS (NEW)	
2026-024	4/13/2026	No Incident Type	BOONE APARTMENTS (NEW)	
BRYANT WALKWAY 1 • Count: 5				
2026-063	5/5/2026	LEASE VIOLATION OTHER THEN SMOKING : DISTURBING THE PEACE AND WELLBEING OF OTHERS : MUSIC	BRYANT WALKWAY 1	
2026-036	4/15/2026	LOCK OUT	BRYANT WALKWAY 1	
2026-031	4/15/2026	DEATH INVESTIGATION	BRYANT WALKWAY 1	
2026-031	4/15/2026	LEASE VIOLATION OTHER THEN SMOKING : FIRE : SMOKE ALARM	BRYANT WALKWAY 1	
2026-028	4/14/2026	LEASE VIOLATION OTHER THEN SMOKING : DISTURBING PEACE AND WELL BEING	BRYANT WALKWAY 1	
BRYANT WALKWAY 2 • Count: 4				
2026-045	4/16/2026	PARKING VIOLATION : TICKET	BRYANT WALKWAY 2	
2026-044	4/15/2026	TRESPASS WARNING : NEW ISSUE	BRYANT WALKWAY 2	
2026-029	4/14/2026	CHECK WELFARE : LOCKED DOOR	BRYANT WALKWAY 2	
2026-017	4/13/2026	SMOKING VIOLATION : CIGARETTE	BRYANT WALKWAY 2	
No Location • Count: 5				
2026-062	5/5/2026	No Incident Type	No Location	
2026-061	4/20/2026	No Incident Type	No Location	



Housing Authority of the City of Columbia, Missouri

201 Switzler Street, Columbia, Missouri 65203

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Recommended Commission Action

Review and consider the report.

Table of Contents	
Tab Name	Report Name
1. Occupancy	Affordable Housing - Occupancy Rate Status Report
2. Occupancy Trend	Affordable Housing - Occupancy Rate Trending Report
3. Waiting List	Affordable Housing - Waiting List Status Report
4. Vacant Unit Status	Affordable Housing - Vacant Unit Status Report
5. Rent Collection	Affordable Housing - Tenant Charge Collection Report
6. Facility Inspections	Facilities and Modernization - Annual Inspections by Facility by Target Date
7. Non-Emg Work Orders	Facilities and Modernization - Non-Emergency Work Order Activity Report
8. Emg Work Orders	Facilities and Modernization - Emergency Work Order Activity Report
9. AH - KPI	Affordable Housing - Key Performance Indicators Report - Financial
10. AH Compliance	Affordable Housing - LIHTC Compliance Reporting
11. HCV Leasing	Housing Choice Voucher - Leasing Activity Report
12. HCV Waitlist	Housing Choice Voucher - Waiting List Status Report
13. HCV - Inspections	Housing Choice Voucher - Inspection Activity Report
14. HCV KPI - Admin	Housing Choice Voucher - Administrative Account - Key Performance Indicators Report - Financial
15. HCV KPI - HAP	Housing Choice Voucher - HAP Account - Key Performance Indicators Report - Financial/Utilization
16. Resident Services	Resident Services - Units of Service and Units Billed

1. Affordable Housing - Occupancy Rate Status Report

Affordable Housing - Occupancy Rate Status Report as of 4/30/2026											
Units	AMP 1	MMV (Patriot)	Bear Creek	Paquin	Stuart Parker	Oak Towers	Bryant Walkway I	Bryant Walkway II	Kinney Point	Park Avenue	Total Affordable Housing
Leased	35	21	71	192	82	142	50	33	33	24	683
Available	35	21	71	192	82	142	50	33	33	24	683
Offline, HUD Approved	15	0	0	0	0	0	0	0	0	55	60
Offline, Other	0	3	5	8	2	5	4	3	1	0	31
Total Units	50	24	76	200	84	147	54	36	34	25	774
Occupancy Rate	70%	88%	93%	96%	98%	97%	93%	92%	97%	96%	88%

Purpose of Report

This report provides the percentage of affordable housing units leased at a point in time. High occupancy is important and is a primary indicator of CHA meeting its mission of housing families and is maximizing its revenue potential. Secondly, a high occupancy can also mean that there are families on the waiting list, maintenance is able to turnaround a vacant unit quickly and administrative staff can qualify the family and put them in the unit in a timely manner.

Instructions

1. Leased Units

Enter the number of units under lease as of the date of the report.

2. Available Units

Enter the number of units under lease or available for lease (i.e., the unit is ready to be leased) as of the date of the report.

3. Offline, HUD Approved

Enter the number of units that are not leased or available to be leased as the units are approved by HUD to be used for another purpose, such as resident services or a police sub-station, or are approved by HUD to be vacant, such as units approved for modernization or casualty loss as of the date of the report. This category reflects units that are not leased but would receive operating subsidy.

4. Offline, Other

Enter the number of units that are included in the "Available" or "Offline, HUD Approved" categories as of the date of the report. Units reported in this category will normally be associated with vacant unit turnaround or units that are used for an alternate purpose that will not be eligible for operating subsidy.

4. Total Units

Sum of available units and offline units, The total should equal the total units for the project.

2. Affordable Housing - Occupancy Rate Trending Report

Affordable Housing - Occupancy Rate Trending Report as of 4/30/2026											
Period	AMP 1	MMV (Patriot)	Bear Creek	Paquin	Stuart Parker	Oak Towers	Bryant Walkway I	Bryant Walkway II	Kinney Point	Park Avenue	Total CHA Housing Rate/Excluding AMP1
1/31/2026	76%	100%	92%	98%	95%	97%	94%	89%	100%	100%	96%
2/28/2026	74%	100%	92%	97%	95%	97%	93%	89%	100%	100%	96%
3/31/2026	74%	96%	95%	97%	98%	98%	93%	92%	100%	100%	96%
4/30/2026	70%	88%	93%	96%	98%	97%	93%	92%	97%	100%	94%
5/31/2026											
6/30/2026											
7/31/2026											
8/31/2026											
9/30/2026											
10/31/2026											
11/30/2026											
12/31/2026											
Occupancy Rate											
2025 Rate	51%	98%	96%	97%	98%	97%	95%	97%	13%	N/A	86%
2024 Rate	69.69	95.41	94.82	96.93	96.91	97.79	95.38	97.42	N/A	N/A	96.38
2023 Rate	86%	96%	96%	97%	96%	97%	95%	93%	N/A	N/A	96%

Purpose of Report

Provides the percentage of affordable housing units leased over a period of time. High occupancy is normally a major indicator of both good financial health and management. The trending information helps identify whether occupancy rates are increasing, decreasing, or holding steady. A certain level of variance can be expected each month. Large changes, especially decreases in the occupancy rate is a risk area, as is a gradual decline in the occupancy rate, or a consistently low rate.

Instructions

1. General

Each month a new row of occupancy rate data will be entered on the report using the occupancy rate data as calculated from the Affordable Housing Occupancy Rate Report. The number of months of previous occupancy rate date is shown, as well as two years of annual occupancy rate data to provide trending information. This form provides occupancy rate data based on a calendar year basis. High performing occupancy rates are considered 96% or higher at family sites and 98% or higher at the Tower properties.

3. Affordable Housing - Waiting List Status Report

Columbia Housing Authority - Waiting List Status Report as of 4/30/2026			
Unit Type	Family Sites	Oak Tower	Paquin Tower
Zero bedroom		205	116
1 bedroom	140	0	6
2 bedroom	514		5
3 bedroom	236		
4 bedroom	111		
Total	1001	205	127

4. Affordable Housing - Vacant Unit Status Report

Columbia Housing Authority - Waiting List Status Report as of 4/30/2026							
	Unit #	Bedroom Size	Date Vacant	Projected Ready Date	Anticipated Lease Date	Application Approved	Days Vacant as of 1/31/2026
AMP 1							
50 Total Units	N/A						
MMV (Patriot)							
25 Total Units	109	1	3/3/2026	5/10/2026	5/15/2026	Intake in process	58
	210	1	3/31/2026	5/10/2026	5/15/2026	Intake in process	30
	301	1	4/14/2026	5/20/2026	5/25/2026	VA working on applicant	16
Bear Creek							
76 Total Units	1304	3	4/16/2026	5/20/2026	5/25/2026	waiting on app. file	14
	1206	2	2/28/2026	Ready	5/15/2026	Intake in process	61
	1118	2	3/18/2025	Ready	5/15/2026	Intake in process	408
	1201	2	12/11/2025	Ready	5/15/2026	Intake in process	140
Paquin							
200 Total Units	302	1	2/27/2026	3/27/2026	5/5/2026	5/1/2026	62
	512	0	2/23/2026	3/19/2026	5/5/2026	5/1/2026	66
	1206	1	3/23/2026	4/8/2026	5/5/2026	5/1/2026	38
	1214	0	4/27/2026	5/13/2026	5/20/2026	applicant in process	3
	1302	1	4/29/2026	5/13/2026	5/8/2026	5/1/2026	1
	1307	0	3/31/2026	4/14/2026	5/8/2026	5/1/2026	30
	1407	0	3/3/2026	4/1/2026	5/8/2026	applicant in process	58
	1408	0	4/23/2026	5/20/2026	5/20/2026	applicant in process	7
Stuart Parker							
84 Total Units	201A Lincoln	2	1/2/2026	4/3/2026	5/7/2026	Waiting on pre approv	118
	202B Lincoln	2	1/21/2026	5/30/2026	5/30/2026	Intake in process	99
Oak Towers							
146 Total Units	305	0	3/14/2026	Ready	5/22/2026	Intake in process	47
	215	0	4/28/2026	5/29/2026	6/1/2026	Intake in process	2
	413	0	4/27/2026	5/15/2026	5/18/2026	Intake in process	3
	512	1	4/17/2026	5/7/2026	5/8/2026	4/10/2026	13
	816	0	4/25/2026	5/22/2026	5/25/2026	Intake in process	5
Bryant Walkway I							
54 Total Units	214 Bryant	2	12/1/2025	Ready	5/19/2026	Transfer in process	150
	206 Allen	1	11/18/2025	Ready	6/4/2026	Intake in process	163
	304 McBaine #102	4	12/5/2025	Ready	5/14/2026	MI 5/20/2026	146
	217 Allen	1	2/9/2025	Ready	5/28/2026	Intake in process	80
Bryant Walkway II							
36 Total Units	410 LaSalle	3	10/23/2025	Ready	5/14/2026	Intake in process	189
	318 LaSalle	1	4/24/2026	In process	6/11/2026	pulling more applicants	6
	312 Pendleton	1	1/8/2026	Ready	5/30/2026	Intake in process	112
Kinney Point							
34 Total Units	805 #101	1	4/24/2026	5/10/2026	5/15/2026	Intake in process	6
Park Avenue							
79 Total Units	Under Construction-Not Tracking Data.						
Number of Vacant Units:		26		Average Days Vacant:		70	

Purpose of Report
 Unit turnaround time (the time from when the unit is vacant until the unit is leased) is a key metric for assessing operational performance. This report provides information on the status of each vacant unit focusing on key information needed to help monitor when the vacant unit will be leased. The goal is to have only a limited number of vacant units at any given time and the time that a unit is offline should be limited to one to two weeks. There may be exceptions or mitigating circumstances, usually a large number of vacant units and/or extended unit turnaround time is an indicator of a operational risk. Low rates of vacant unit turnaround can be caused by multiple factors. Maintenance delays can result in extended unit turnaround time can be due to lack of available materials, large number of outstanding work orders, other work priorities, and the condition of the units. Other contributing factors may include include adequacy of waitlist, admission processing, and management oversight.

Instructions

- Project 1 & Project 2**
Enter the Property name, unit #, and bedroom size for each vacant unit.
- Date Vacant**
Enter the date that the unit became vacant.
- Projected Ready Date**
Enter date maintenance is expected to have all the work completed in the unit. Date unit may be leased or actual date maintenance informed management that unit can be leased.
- Anticipated Lease Date**
Enter the date the project manager is expected to have the unit leased. If the unit is leased, the unit should be removed from the report.
- Application Approved**
Enter either Yes or No. Yes, means that a family has accepted the unit, all background checks and other admission processes have been completed.
- Days Vacant as of Report Date.**
The number of calendar days since the unit became vacant and the date of the report. In this example, the days are based as if the date of the report was 1/31/2026.
- Special Purpose Units / Long-Term Vacant Units**
The report should not include special purpose units, i.e., units that are not used for housing such as units for resident services, maintenance storage, etc. However, all other vacant units, those that are HUD-approved (units undergoing modernization, casualty loss, disaster) and those that are non-HUD approved and therefore, not receiving operating subsidy should be included in the report.

5. Affordable Housing - Tenant Charge Collection Report

Affordable Housing - Tenant Charge Collection Report as of 4/30/2026											
Description	AMP 1	MMV (Patriot)	Bear Creek	Paquin	Stuart Parker	Oak Towers	Bryant Walkway I	Bryant Walkway II	Kinney Point	Park Avenue	Total Affordable Housing
Tenant Rent Charges	12,688	18,077	51,921	124,500	51,930	100,802	33,033	18,798	51,726	18,523	481,999
Other Tenant Charges	249	131	15	1,410	167	699	15	15	252	-	2,952
Repayment Agreement Charges*											
Total Charges this Month	12,937	18,208	51,936	125,910	52,097	101,500	33,048	18,813	51,978	18,523	484,951
Collections this Month	12,359	17,064	43,773	117,007	49,261	97,488	24,275	17,496	50,285	15,900	444,909
Collection Rate	95.5%	93.7%	84.3%	92.9%	94.6%	96.0%	73.5%	93.0%	96.7%	85.8%	91.7%
Total Tenant Accounts Receivable (TAR)											
Total Delinquent Households	10	6	33	43	22	30	21	10	2	6	183
Total Amount Outstanding	\$3,082	\$3,659	\$17,470	\$15,800	\$12,064	\$8,164	\$22,361	\$2,972	\$2,761	\$5,780	\$94,113
Under Repayment Agreement											
Total Number of Households	2	3	7	9	3	10	4	1	0	1	40
Total Amount Outstanding	\$836	\$2,519	\$4,699	\$4,083	\$7,513	\$4,366	\$3,277	\$1,231	\$0	\$172	\$28,697
Households in Termination											
Total Number of Households	1	0	0	7	1	4	4	1	0	0	18
Total Amount Outstanding	\$248	N/A	N/A	\$3,029	\$556	\$1,690	\$1,283	\$214	N/A	N/A	\$7,019

Purpose of Report

This report provides the amount of tenant charges due and collected during the month. The report includes both rent and non-rent tenant charges. HUD's standard (Interim PHAS – Tenant Account Receivable – TAR ratio) is that 98.5% of all tenant charges is expected to be collected.

Instructions

1. Tenant Rent Charges

The total amount of tenant rent charged during the month.

2. Other Tenant Charges

The total amount of non-rent charged during the month and would include all other tenant charges except repayment agreements. Examples would include such items as maintenance charges, late fees, excess utility charges, lock-out fees, etc.

3. Repayment Agreement Charges

The total amount of tenant payment due during the month from participants' repayment agreements.

4. Collections this Month

The total amount payment received from tenants for all the above charges during the month.

6. Facilities- Annual compliance checklist by month by property as of 4/30/2026

This report is provided to keep the Board informed on annual facility inspections and compliance.

Annual Inspections Compliance Checklist by Property													
Property	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Paquin Towers													
Water Treatment Systems – Annual Service	Monthly	X	X										
Sprinkler System – Annual Inspection	January	X											
Fire Pumps – Annual Inspection	January	X											
Backflow Preventers – Annual Test	January	X											
Elevators – Annual Inspection	February				X								
Fire Extinguishers – Annual Inspection	February		X										
Fire Alarm System – Annual Inspection	March				X								
Generators – Annual Inspection	June												
Oak Towers													
	Inspection Month/Quarter Target	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Water Treatment Systems – Annual Service	Monthly	X											
Sprinkler System – Annual Inspection	January	X											
Fire Pumps – Annual Inspection	January	X											
Backflow Preventers – Annual Test	January	X											
Elevators – Annual Inspection	February				X								
Fire Extinguishers – Annual Inspection	February		X										
Fire Alarm System – Annual Inspection	April				X								
Generators – Annual Inspection	June												
Admin Building													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Backflow Preventers – Annual Test	January	X											
Fire Extinguishers – Annual Inspection	February		X										
Fire & Burglar Alarm Systems – Annual Inspection	May												
Blind Boone Center													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Fire Extinguishers – Annual Inspection	February		X										
Fire & Burglar Alarm Systems – Annual Inspection	May												
Backflow Preventers – Annual Test	October												
Stuart Parker Laundromat													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Backflow Preventers – Annual Test	January	X											
Fire Extinguishers – Annual Inspection	February		X										
Fire & Burglar Alarm Systems – Annual Inspection	May												
Bear Creek Laundromat													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Backflow Preventers – Annual Test	January	X											
Fire Extinguishers – Annual Inspection	February		X										
Fire & Burglar Alarm Systems – Annual Inspection	May												
Bear Creek Community Bldg. 1400 Elleta													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Backflow Preventers – Annual Test	January	X											
Fire Extinguishers – Annual Inspection	February		X										
Fire & Burglar Alarm Systems – Annual Inspection	May												
Mid Mo Veterans Housing													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Backflow Preventer – Annual Test	January	X											
Fire Extinguishers – Annual Inspection	February		X										
Fire Alarm System – Annual Inspection	May												
Sprinkler System – Annual Inspection	October												
Kinney Point													
	Inspection Month Target/Goal	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Community Building Backflow Preventer-Annual Test	January	X											
Community Building Fire Extinguishers-Annual Inspection	February		X										
Community Building-Burglar Alarm-Annual Inspection	May												
Sexton Units-Sprinkler System-Annual Inspection	October												
Purpose of Report													
This report provides a list of annual inspections needed for on-going occupancy and operational compliance for all CHA facilities. Inspections include sprinkler, backflow preventer, fire extenguisher, generator, elevator and other safety inspections specific to each property. The report also includes a "target" completion date, knowing that the specific date of scheduling may dependent upon outside organizations and officials.													

7. Affordable Housing - Non-Emergency Work Order Activity Report

Affordable Housing - Non-Emergency Work Order Activity Report as of 4/30/2026											
Description	AMP 1	MMV (Patriot)	Bear Creek	Paquin	Stuart Parker	Oak Towers	Bryant Walkway I	Bryant Walkway II	Kinney Point	Park Avenue	Total CHA Housing
Beginning Balance	0	0	0	0	3	4	0	0	0	0	7
Received this Month	28	5	29	108	59	94	17	20	22	1	383
Closed this Month	28	5	28	108	50	94	17	20	22	1	373
Ending Balance	0	0	0	0	0	0	0	1	0	0	1
Closed this Month	28	5	28	108	50	94	17	20	22	1	373
Closed this Month and Preceding 11 months	371	98	373	1,131	561	1011	324	240	54	56	4,373
Average Closed per Last 12 Months	31	8	31	94	47	84	27	20	5	5	364

Purpose of Report

This report provides basic information to assist in monitoring timely work order completion. CHA's goal is to complete each work order as soon as possible, while taking into consideration other maintenance work priorities, and maximum time of 3 business days. The report provides information on the number of non-emergency work orders received and completed each month. CHA staff may need to review further if the ending balance of open work orders or the total number of work order received each month is increasing. HUD does not define what requests generate a work order. Generally, CHA works to capture most work completed on property including unit turns, restorations and preventative maintenance, in an effort to capture all work completed on CHA properties.

Instructions

- 1. Beginning Balance**
Report the total number of open non-emergency work orders at the beginning of the month. This number should be the ending balance reported from the prior month's report.
- 2. Received this Month**
Report the total number of non-emergency work orders that were received during the month regardless of who requested the work be completed.
- 3. Closed this Month**
Report the total number of non-emergency work orders that were closed during the month.
- 4. Ending Balance**
The number of work orders that are open at the end of the month, calculated as Beginning Balance plus Received this Month minus Closed this Month.
- 5. Closed this Month and Preceding 11 Months**
The total number of non-emergency work order that were closed in the last twelve months.
- 6. Average Closed per Last 12 Months**
The total number of non-emergency work order that were closed in the last twelve months divided by 12. Used as a benchmark to compare current monthly work orders closed.

8. Affordable Housing - Emergency Work Order Activity Report

Affordable Housing - Emergency Work Order Activity Report as of 4/30/2026											
Description	AMP 1	MMV (Patriot)	Bear Creek	Paquin	Stuart Parker	Oak Towers	Bryant Walkway I	Bryant Walkway II	Kinney Point	Park Avenue	Total CHA Housing
Received this Month	0	0	2	2	4	3	1	0	0	1	13
Work completed within 24 hours	0	0	2	2	4	3	1	0	0	1	13
% Closed within 24 hours	#DIV/0!	#DIV/0!	100%	100%	100%	100%	100%	#DIV/0!	#DIV/0!	100%	100%

Purpose of Report

This report provides information on the number of emergency work orders received and closed within 24 hours for the month. HUD requires that all emergency work orders be closed or abated within 24 hours.

Instructions

1. Received this Month

Report the total number of emergency work orders that were received during the month regardless of who requested the work to be completed.

2. Closed with 24 hours

Report the total number of emergency work orders that were closed or abated with 24 hours of being reported.

**Columbia Housing Authority
Property Financial Performance Indicators Report
as of 4/30/2026**

CHA Property Financial Performance Indicators Report													
	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Monthly Target
AMP 1													
Operating Cash	\$ 726,566	\$ 514,417	\$ 636,380	\$ 591,609									\$ 500,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 34,803	\$ 209,656	\$ 63,893	\$ 226,966									\$ 50,000
Cash Exp. (excludes dep, amort, accrued int.)	\$ 246,952	\$ 87,693	\$ 105,664	\$ 225,843									\$ 75,000
Net Cash Operating Income	\$ (212,149)	\$ 121,963	\$ (41,771)	\$ 1,123									\$ (25,000)
MMV (Patriot)													
Operating Cash	\$ 20,406	\$ 25,872	\$ 31,000	\$ 29,864									\$ 20,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 26,307	\$ 20,321	\$ 17,122	\$ 17,654									\$ 19,000
Cash Exp. (excludes dep, amort, accrued int.)	\$ 20,841	\$ 15,196	\$ 18,258	\$ 19,011									\$ 15,000
Net Cash Operating Income	\$ 5,466	\$ 5,125	\$ (1,137)	\$ (1,357)									\$ 4,000
Bear Creek													
Operating Cash	\$ 301,168	\$ 244,301	\$ 250,562	\$ 146,556									\$ 50,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 108,710	\$ 58,931	\$ 54,945	\$ 55,992									\$ 1,500
Cash Exp. (excludes dep, amort, accrued int.)	\$ 165,577	\$ 52,670	\$ 158,951	\$ 66,374									\$ 14,000
Net Cash Operating Income	\$ (56,867)	\$ 6,261	\$ (104,006)	\$ (10,382)									\$ 20,000
Stuart Parker w/ Paquin													
Operating Cash	\$ 128,613	\$ 163,388	\$ 162,887	\$ 125,934									\$ 200,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 266,484	\$ 273,359	\$ 211,084	\$ 203,144									\$ 175,000
Cash Exp. (excludes dep, amort, accrued int.)	\$ 231,709	\$ 273,860	\$ 248,037	\$ 248,084									\$ 125,000
Net Cash Operating Income	\$ 34,775	\$ (501)	\$ (36,953)	\$ (44,940)									\$ 20,000
Oak Towers													
Operating Cash	\$ 87,585	\$ 96,035	\$ 111,963	\$ 97,562									\$ 100,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 104,761	\$ 104,465	\$ 105,278	\$ 106,928									\$ 75,000
Cash Exp. (excludes dep, amort, accrued int.)	\$ 99,011	\$ 88,538	\$ 119,679	\$ 114,928									\$ 50,000
Net Cash Operating Income	\$ 5,751	\$ 15,928	\$ (14,401)	\$ (8,000)									\$ 25,000
Bryant Walkway I													
Operating Cash	\$ 14,305	\$ 16,774	\$ 20,587	\$ 36,165									\$ 20,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 36,835	\$ 31,735	\$ 43,410	\$ 34,266									\$ 35,000
Cash Exp. (excludes dep, amort, accrued int.)	\$ 34,368	\$ 27,921	\$ 27,832	\$ 36,557									\$ 28,000
Net Cash Operating Income	\$ 2,466	\$ 3,814	\$ 15,577	\$ (2,291)									\$ 7,000
Bryant Walkway II													
Operating Cash	\$ 77,273	\$ 83,885	\$ 86,572	\$ 95,472									\$ 75,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 24,553	\$ 19,339	\$ 31,427	\$ 21,878									\$ 25,000
Cash Exp. (excludes dep, amort, accrued int.)	\$ 17,971	\$ 16,622	\$ 22,526	\$ 24,457									\$ 22,000
Net Cash Operating Income	\$ 6,582	\$ 2,717	\$ 8,901	\$ (2,579)									\$ 3,000
Kinney Point													
Operating Cash	\$ 63,486	\$ 79,620	\$ 78,010	\$ 90,711									\$ 50,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 25,983	\$ 61,801	\$ 40,426	\$ 52,520									\$ 25,500
Cash Exp. (excludes dep, amort, accrued int.)	\$ 9,850	\$ 63,411	\$ 27,725	\$ 38,740									\$ 20,000
Net Cash Operating Income	\$ 16,134	\$ (1,610)	\$ 12,701	\$ 13,780									\$ 5,500
Park Avenue													
Operating Cash	\$ 87,681	\$ 84,788	\$ 113,396	\$ 120,863									\$ 75,000
Cash Rev. (excludes dep, amort, accrued int.)	\$ 17,697	\$ 62,897	\$ 19,105	\$ 114,328									\$ 21,750
Cash Exp. (excludes dep, amort, accrued int.)	\$ 20,589	\$ 34,289	\$ 11,638	\$ 17,378									\$ 15,000
Net Cash Operating Income	\$ (2,893)	\$ 28,608	\$ 7,467	\$ 96,950									\$ 6,750
Total Positive LIHTC Operating Cash-Exc AMP1	\$ (200,735)	\$ 182,304	\$ (153,621)	\$ 42,304	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 91,250

CHA Business Activities Management Fees Earned and Related Monthly Cash Revenue													
	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Monthly Target
Property Management Fees Earned-LIHTC	\$ 27,035.65	\$ 27,351.21	\$ 27,188.39	\$ 27,131.92									
Equipment Rental Income-LIHTC	\$ 1,225.87	\$ 1,225.87	\$ 1,225.87	\$ 1,225.87									
Non-Dwelling Rental Income	\$ 6,924.25	\$ 6,924.25	\$ 6,924.25	\$ 6,924.25									
Total	\$ 35,185.77	\$ 35,501.33	\$ 35,338.51	\$ 35,282.04	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	

Purpose of Report

This report provides trending information of financial accounts and occupancy data. The data in the report is used to compare the data to the targets were established as part of the CHA's budgeting process. If the line item meets or exceeds the target, then staff will highlight that within the report. Trend data should be reviewed for large variances from month to month and adverse trends should be reviewed.

- 1. Operating Cash**
CHA must operate with appropriate level of cash and investments. CHA's timing of revenue received is dependent upon each program and account, as well performance of properties. CHA historically experiences the need to manage cash more closely in the first quarter while paying annual bills such as insurance premiums and awaiting property cashflow distributions. CHA also experiences the need to manage cash more closely in 4th quarter, as CHA's experiences higher programming costs and interfund debts are higher, as CHA awaits property performance cash distributions.
- 2. Cash Revenue and Expenses (Excluding depreciation, amortization, accrued interest)**
CHA needs to track monthly cash revenue against expenses to ensure timely review of property performance and to ensure revenues exceed expenses. CHA LIHTC property finances are accounted for according to GAAP and accrual standards rather than cash, therefore amortization, depreciation, as well as non-cash accrued interest and principle payments make a real time review of property cash performance more challenging.
- 3. Monthly Net Cash Operating Income**
Provides the amount of positive cash performance based upon cash revenue and expenses.

10. AH Operations-LIHTC Property Compliance

Monthly LIHTC Compliance Reporting Milestones as of 4/30/2026												
Property / Report	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ALL LIHTC PROPERTIES												
MHDC Vacancy / VAWA Report	X	X	X	X								
UMB Bank Quarterly Bond Report – Q1	X			X								
UMB Bank Quarterly Bond Report – Q2												
UMB Bank Quarterly Bond Report – Q3												
UMB Bank Quarterly Bond Report – Q4												
IRS Form 8703 – Bond Projects			X									
BEAR CREEK												
MHDC Down Unit Status	X	X	X	X								
MHDC Utility Allowance			X									
MHDC Exhibit A (COL/AOC)	X											
MHDC Exhibit Z			X									
BRYANT WALKWAY I												
MHDC Down Unit Status	X	X	X									
MHDC Utility Allowance			X									
MHDC Exhibit A (COL/AOC)												
MHDC Exhibit K												
MHDC Exhibit Z												
BRYANT WALKWAY II												
MHDC Utility Allowance			X									
MHDC Exhibit A (COL/AOC)				X								
MHDC Exhibit K				X								
MHDC Exhibit Z												
OAK												
MHDC Exhibit A (COL/AOC)				X								
MHDC Exhibit Z												
STUART PARKER												
MHDC Exhibit A (COL/AOC)	X											
MHDC Exhibit Z			X									
MMV-Patriot												
MHDC Exhibit A (COL/AOC)												
MHDC Exhibit Z												
MHDC Exhibit AHAP-35												
Kinney Point												
MHDC Exhibit A (COL/AOC)												
MHDC Exhibit Z												
Park Avenue												
MHDC Exhibit A (COL/AOC)												
MHDC Exhibit Z												
McBaine Townhomes												
MHDC Exhibit H			X									
MHDC Exhibit K			X									
Purpose of Report												
This report provides a monthly checklist to denote compliance report submission completion. Each LIHTC property has compliance reports that are due throughout the year to MHDC, UMB Bank, and the Federal Home Loan Bank.												

11. Housing Choice Voucher - Leasing Activity Report

Housing Choice Voucher Leasing - Activity Report as of 4/30/2026			
Family Searching Activity Report			
Activity		Prior Month	Current Month
Beginning Balance	Family Searching, End of Prior Month (Includes ports, CoC, VASH, HCV-closed)	29	38
plus	During the Month	Vouchers Issued	20
plus		Request for Tenancy Approval - Denied	0
minus		Vouchers Expired /Cancelled	1
minus		Request for Tenancy Approval	4
Ending Balance	Family Searching, End of Month	31	52
Request for Tenancy Approval Activity Report			
Activity		Prior Month	Current Month
Beginning Balance	Request for Tenancy Approval - In Process, End of Prior Month	7	4
plus	During the Month	New Request for Tenancy Approval	5
minus		Request for Tenancy Approval - Denied	0
minus		Request for Tenancy Approval - Approved Waiting Lease/HAP/Move-in	5
minus		Request for Tenancy Approval - New Admissions	2
Ending Balance	Request for Tenancy Approval - In process, End of Month	4	2
		Success Rate	86%
			95%
Vouchers Leased Activity Report			
Activity		Prior Month	Current Month
Beginning Balance	Vouchers Leased, End of Prior Month (excludes PBV/CHA owned property)	1090	1088
plus	During the Month	New Admissions	2
plus/minus		Portability Absorption Activity	0
minus		End of Participations	6
Ending Balance	Vouchers Leased, End of Month	1088	1084
		Target - New Admissions, Next Month	
		Target - Voucher Leased, End of Next Month	
		Voucher Turnover Rate	0.6%
			0.6%

Purpose of Report	
<p>Family Searching Activity Report. Provides information on applicants provided a voucher and searching for a unit. If the family is unable to find a unit after a period of time, the voucher will expire, and can be made available to another applicant on the waitlist. When the CHA reaches the limit of either HAP funding or authorized vouchers, it will need to stop issuing vouchers.</p>	
<p>Request for Tenancy Approval Activity Report. Provides information on applicants that have found a unit and are requesting CHA to approve the unit and enter into a HAP contract with the owner, so the applicant can enter into a lease agreement with the owner. The success rate is a key figure in understanding the voucher program. Success rate represent the percent of voucher issued where the family has found a unit in which they are able to move-in. The success rate is important to understanding how many vouchers needed to be issued to increase leasing.</p>	
<p>Voucher Leased Activity Report. Provides information on the number of families that are in CHA's HCV program. The number of vouchers available to lease during a calendar year is constrained by the amount of funds HUD provides for HAP (i.e., payment to landlords) and the number of vouchers CHA has been authorized. If CHA leases more vouchers than authorized, any associated overage of HAP used must be returned to HUD. Once the CHA uses it HUD funding for HAP payments for the year, there are limited options for CHA to receive additional funding to avoid terminating HAP assistance. The next year's HAP funding is highly correlated to the amount of HAP spent in the prior year. Therefore, if CHA is not spending as much HAP as available, it may shrink funds available to CHA next year.</p> <p>The target number of vouchers the PHA should have leased for any given month is difficult to determine, however is based on known factors, such as voucher authorized, current funding levels and current program metrics but there are other estimates that are more difficult to predict that are part of the target number, such as future appropriation levels and changes in the economy and local housing market. CHA works with its HUD Field Representative each month to review HUD's two-year forecasting tool to determine their targets and decisions. The forecasting tool takes into consideration many of the factors described and generates an output of how many vouchers should be issued in the upcoming month to reach proper a number of vouchers leased.</p>	
<p>Voucher Turnover Rate/Attrition. The voucher turnover rate provides how many families will likely leave the program in any given month. This number affects the number of vouchers that need to be issued each month. If two families leave the program on average each month and the PHA has a success rate of 60%, the PHA will need to issue three to four vouchers each month to stay at the current level of leasing.</p>	

Instructions	
<p>1. General The data needed to update the report each month is derived from CHA's management information system.</p>	
<p>2. Family Searching Activity Report - Request for Tenancy Approval - Denied This figure represents a family request for tenancy approval that was denied by CHA and the family has been given more time to search for an acceptable unit.</p>	
<p>3. Request for Tenancy Approval Activity Report - Approved Waiting Lease/HAP/Move-in vs New Admissions Families where the request for tenancy was approved but delays in paper work, availability of the unit, etc. has resulted in the family not actually being under lease / taking position of the unit are recorded in this line. Families should be counted as new admissions, when the family has officially entered the program.</p>	
<p>4. Vouchers Leased Activity Report - Portability Absorption Activity The "Portability Absorption Activity" row is used to account for absorption activity that affects the number of ACC vouchers leased CHA is considered to have. If a port-in family is absorbed by CHA, the leased voucher is now considered part of CHA's ACC inventory and leased, therefore the voucher is added to the voucher leased count. While if a port-out family is absorbed by a receiving PHA, the voucher is no longer considered leased by the CHA and therefore the voucher should be subtracted from the CHA's voucher leased count.</p>	

12. Housing Choice Voucher - Waiting List Status Report

Housing Choice Voucher Waiting List Status Report as of 4/30/2026		
Applicant by Bedroom Size Needed	Number of Applicants	% of Applicants
1 bedroom	86	48%
2 bedroom	41	23%
3 bedroom	44	24%
4 bedroom or more	9	5%
Total	180	100%

13. Housing Choice Voucher - Inspection Activity Report

Housing Choice Voucher Inspection Activity Report for the month ended 4/30/2026				
Inspection Type	Due to be Completed	Initial Inspections Completed	% Completed	Re-Inspections Completed
Annual Inspections	209	193	92%	28
Initial Inspections	20	19	95%	2
Special Inspections	19	17	89%	1
Quality Control	5	5	100%	2
Total	253	234	92%	33

Purpose of Report
HUD requires voucher units to be inspected to ensure the unit meets standards of being safe, sanitary and decent. Units are inspected based on HUD regulations and the PHA's policy. The report shows the number of inspections that should have been completed and the inspections completed by inspection type. The report demonstrates if inspections are completed on a timely basis.

Instructions
<i>1. Due to Be Completed</i>
Enter the number of inspections that should have been completed for the inspection type during the month based on the PHA's policy and procedures, including any inspection that should have been completed in previous months. This figure does not include re-inspections.
<i>2. Initial Inspections Completed and Re-inspections Completed</i>
Enter the number of initial inspections and re-inspections completed for the inspection type during the month.

**Housing Choice Voucher - Administrative Account
Key Performance Indicators Report - Financial
as of 4/30/2026**

HCV Administrative Account	Fiscal Year Ended 12/31/2025	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	CHA Target
Cash	\$ 284,360	\$ 311,796	\$ 307,525	\$ 300,688										≥ \$40,000
Total Administrative Fees Earned*	\$ 113,736	\$ 117,241	\$ 116,613	\$ 116,267										
Monthly Net Operating Income		\$ (10,045)	\$ (61,304)	\$ (20,025)										
Year to Date Net Operating Income	\$ (148,940)													\$ 1,000
Vouchers Leased*	1,649	1,624	1,633	1,626										243
Ratio Analysis														
Quick Ratio	4.0	3.9	3.1	3.4										≥ 10.0
Months Expendable Fund Balance	0.04	5.8	1.2	0.5										≥ 3.0

* For Fiscal Year Ended Columns, the line item represent the monthly average for the year, making it comparable to the monthly and target columns.

Purpose of Report

The Key Performance Indicators (KPI) Report - Administrative Account Financial provides trending information of important financial accounts and leasing data of the HCV administrative account. The use of the KPI report is used for monitoring the trending of certain financial items to help in performing the monitoring and oversight role for a PHA's financial condition.

1. Cash and Investments

Without a proper level of cash and investments the PHA is operating at a higher level of risk. Decreases in cash and investment is typically associated with a PHA whose monthly revenue does not covers its monthly expenses. Cash and investment increasing at a higher than expected rate, should Iso be reviewed.

2. Total Administrative Fees Earned

Administrative fees are earned based on the number of vouchers leased each month and for most PHAs, represent the vast majority of funding that supports the operations of the HCV program. Decreases in administrative fees due to either lower leasing or appropriations level is normally a high risk item for most PHAs, as expenses in the program are difficult to decrease in the short-term, which may result in net losses and the use of reserves to cover those costs.

3. Net Operating Income

Net operating income (both monthly and year to date) represents revenue minus monthly expenses. A positive figure means the PHA made a profit, while a negative number is associated with a loss. There will be some months where a loss or a larger than normal profit will occur simply as a result of timing issues as certain expenses are seasonal or do not occur monthly, while revenue is more stable from month to month. However, consistent losses should be reviewed.

4. Voucher Leased

The administrative fee revenue that can be generated in the HCV program is correlated to the number of vouchers leased as HUD provides administrative fees based on vouchers leased at the beginning of the month. Additional oversight and monitoring is needed when leasing is decreasing and/or the leasing target is not reached. Lower than expected leasing levels may result in net losses and a decrease in cash and investments.

5. Ratio Analysis

Ratios analysis is used to summarize and simplify a lot of financial data into a few meaningful numbers and allows for the quick examination of different aspects of an entity's performance.

Quick Ratio. The quick ratio measures liquidity/solvency and helps answer the question – *does the HCV administrative account have enough cash and other current assets to pay the bills that are due?* The ratio result is in terms of the number of times the HCV administrative account can pay its current bills. For example, a Quick Ratio of 3 means the PHA can pay its current bill 3 times (i.e., the PHA has 3 times as much cash/other current assets than current liabilities due).

Months Expendable Net Asset Ratio (MENAR). The MENAR measures how long (the number of months) the PHA can continue to administer the HCV program without any additional funding and answer the question – *are there adequate reserves based in the HCV administrative account?* The ratio result is expressed as the number of months the PHA can operate the HCV program without additional funds. For example, a PHA with a MENAR of 4 can operate for 4 months without additional funds before running out of money.

Instructions

1. General

Each month, copy the latest three months of data from the prior report and paste it into the columns for the first three month of the current report. Then key in the data for the current month. The needed information can be found in the PHA's monthly financial statements and leasing activity report.

2. Fiscal Year Ended mm/dd/yyyy

Once the PHAs closes its books for the fiscal year data, the PHA should update the fiscal year ended mm/dd/yyyy columns. Data from the 2nd fiscal year ended column should be copied into the first column and data from the PHA's most recent year end unaudited financial statements and then audited financial statements should be entered into the 2nd column of fiscal year ended mm/dd/yyyy.

3. Targets

As part of the budgeting process the Board and senior management should develop the upcoming targets for each of the line item by month. Some targets may remain a constant number throughout the year while others may change each month based on what the PHA's goals are for the year. Once the targets are determined, each month the target will be updated to reflect the appropriate value.

4. Ratio Analysis

Quick Ratio. The PHA can calculate this ratio from its month end balance sheet by dividing current assets by current liabilities.

Months Expendable Net Asset Ratio (MENAR). PHA can calculate this ratio from its month end balance sheet and income statement by subtracting current liabilities from current assets and then dividing the result by the year-to-date operating expense and then dividing by the number of months of operating expense data.

15. Housing Choice Voucher - HAP Account - Key Performance Indicators Report - Financial / Utilization

**Housing Choice Voucher - HAP Account
Key Performance Indicators Report - Financial / Utilization
as of 4/30/2026**

HCV HAP Account		Calendar Year Ended 12/31/2023	Calendar Year Ended 12/31/2024	Calendar Year Ended 12/31/2025	Calendar Year End Target	Jan. 2026	Feb. 2026	March 2026	April 2026	May 2026	June 2026	July 2026	August 2026	Sept. 2026	Oct. 2026	Nov. 2026	Dec. 2026
PHA HAP Activity Status Report																	
Beginning Balance	Cash & Investments (RNP)			\$ (29,421)		\$ 52,064	\$ 89,545	\$ 146,577									
plus	HUD HAP Funds Disbursed			\$ 11,867,095		\$ 989,743	\$ 1,030,038	\$ 990,520									
plus/minus	Other HAP Activity			\$ 6,408		\$ 272	\$ 160	\$ 536									
minus	Housing Assistance Payments			\$ 11,792,018		\$ 952,534	\$ 973,166	\$ 977,868									
Ending Balance	Cash & Investments (RNP)	\$ -	\$ -	\$ 52,064		\$ 89,545	\$ 146,577	\$ 159,765	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
HUD Held Program Reserves Status Report																	
Beginning Balance	HUD Held Program Reserves			\$ 179,121		\$ 117,416	\$ 215,435	\$ 273,160									
plus	Annual Budget Authority			\$ 11,834,811		\$ 1,087,762	\$ 1,087,762	\$ 1,087,762									
minus	HUD HAP Funds Disbursed			\$ 11,896,516		\$ 989,743	\$ 1,030,038	\$ 990,520	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Ending Balance	HUD Held Program Reserves	\$ -	\$ -	\$ 117,416		\$ 215,435	\$ 273,160	\$ 370,402	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Utilization & Leasing Statistics Report																	
Average HAP Expense	#DIV/0!	#DIV/0!	\$ 595.89		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
HAP Utilization - ABA Only (SEMAP)	#DIV/0!	#DIV/0!	99.6%		0.875682091	0.894649478	0.898972086	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
HAP Utilization - All Funds	#DIV/0!	#DIV/0!	99.8%		0.835483966	0.826490775	0.791875783	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Vouchers Leased per Month			1,649		1,624	1,633	1,626										
Vouchers Leased per Year			19,789														
Vouchers Authorized			22,180		22180	22180	22180										
% of Voucher's Leased	#DIV/0!	#DIV/0!	89%		0	0	0	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!

Purpose of Report

The Key Performance Indicators (KPI) Report - HAP Account- Financial /Utilization provides trending information of important financial accounts, utilization and leasing data of the HCV HAP account. The use of the KPI report is most useful for smaller PHAs, as monitoring the trending of certain financial items can substantially help in performing the monitoring and oversight role for a PHA's financial condition.

The data in the report can be used in two ways. The first is to compare the data to the targets that were established as part of the PHA's budgeting process. If the line item meets or exceeds the target, then it is shown in green and is considered a low-risk item. However, if the line item is less than the target, then it is shown in red and is considered a high-risk item. Secondly, multiple time periods of data is provided for trend analysis. Trend data should be reviewed for large variances from month to month and compared to previous years. Adverse trends should be questioned and explained.

PHA HAP Activity Report. This section of the report provides information on the HAP funding provided by HUD to make HAP payments. Each month HUD will provide HAP funds to the PHA to make HAP payments. The amount of HAP funds HUD provides each month is strongly tied to the amount of HAP the PHA has spent in its most recent months. If the PHA did not need all the funds provided, then the unused funds are held by the PHA to be used in later months. The table provides historical and current activity. In reviewing this section of the report, users should first concentrate on the "Housing Assistance Payments" line, looking for increasing HAP costs. If the PHA HAP costs are increasing, the concern becomes will HUD's next disbursement and any unspent cash from previous months be enough to make the next payment or does the PHA needs to contact HUD for additional funds. In addition, the table can be used to review HUD's HAP disbursement for large variances. Note: HUD normally provides PHAs a disbursement schedule of their near-term HAP disbursements.

HUD Held Program Reserves Status Report. This section of the report provides information on the HAP funding available to the PHA but held by HUD. Under current rules, HUD is allowed only to disburse HAP funding in an amount that is needed for immediate use. This requirement can result in HUD holding sizeable HAP funds on behalf of the PHA. The funds held by HUD for a PHA are called HUD-held Program Reserves and these funds can be made available to the PHA, if the scheduled disbursement amount and any unspent HAP cash will not cover upcoming HAP costs. When determining how many vouchers can be leased and supported, it is important to take into consideration the HUD-held program reserves.

Note: During the course of the current year (in this case Calendar Year Ended 12/31/2019), for simplification reasons this report does not technically align with the actual HUD-held program reserves calculation HUD uses. However, the report does show the resources that will be available to the PHA by the end of the calendar year. For example, technically, undisbursed annual budget authority does not become program reserves until the end of the calendar year, HUD incrementally gets HAP appropriations throughout the year, etc. However, from a monitoring point of view the key is understanding the total HAP funds that will be available to the PHA for the calendar year.

Utilization & Leasing Statistics Report. This section of the report provides information on utilization and leasing. HAP utilization refers to the percentage of annual budget authority or the amount of all HAP funds (i.e., including HUD-held programs reserves, unspent cash held by the PHA) that was used to support HAP. If the PHA has a low HAP utilization percentage it should raise the question why are HAP funds not being used (i.e., can the PHA lease more vouchers?)? If the HAP utilization is too high, the question becomes can the PHA continue to support the vouchers? The voucher leasing information provides information on the percent of vouchers authorized to the PHA and the number of vouchers used. At the end of the calendar year the PHA is considered to be non-compliant if the PHA leased more vouchers than it was authorized. Since the goal of the program is to providing housing, the utilization numbers can be used to help ensure that the PHA is leasing as many vouchers as it can within its funding limitations.

Instructions

1. General
The most recent months of HAP activity as well as two years of calendar year end data to provide trending information will continue to be shown on the report. The current open calendar year is also shown on the report accumulative. Data to update the report each month will come from information provided by HUD to the PHA in the form of disbursement schedules, reserves calculations, etc. and information contained in the PHA's management information system.

Targets

As part of the budgeting process, the Board and senior management should develop the targets for the upcoming year. For the HCV program, these targets should be supported through the use of the two-year forecasting tool. In the HCV program, the targets will likely need to be reviewed and updated each month.

16. Resident Services Grant Performance Activity as of 4/30/2026

CHALIS Grants	2026 Percent Billed	Calendar Year 2026 Target Units	Calendar Year 2026 Target Grant Dollars	Jan. 2026	Feb. 2026	March 2026	April 2026	May 2026	June 2026	July 2026	August 2026	Sept. 2026	Oct. 2026	Nov. 2026	Dec. 2026
Healthy Home Connections (HHC): Case Managment	33%	11,548	\$ 118,367	842	839	1105	\$ 1,027								
Independent Living Program (ILP): Case Managment	100%	3,333	\$ 35,000	1,000	1000	1333	\$ -								
Moving Ahead Program: Out-of-School Programming	100%	67,460	\$ 67,460	4,575	4500	4500	\$ 2,298								
Moving Ahead Program: Out-of-School Programming	100%	14,118	\$ 60,000	3,572	3207	2381	\$ 4,958								
Moving Ahead Program: Out-of-School Programming	9%	32,220	\$ 136,935	0	0		\$ 2,950								
Moving Ahead Program: Family Development	21%	750	\$ 60,000.00	7	76	42	34								
Moving Ahead Program: Family Education	37%	350	\$ 3,062.50	33	21	36	40								
TOTALS		78273	\$ 480,824.50												

HUD ROSS Grants	Enrolled Jan. 2026	Enrolled Feb. 2026	Enrolled March 2026	Enrolled April 2026	Enrolled May 2026	Enrolled June 2026	Enrolled July 2026	Enrolled Aug. 2026	Enrolled Sept. 2026	Enrolled Oct. 2026	Enrolled Nov. 2026	Enrolled Dec. 2026
Resident Opportunity and Self-Sufficiency (ROSS)	4	12	4	0								
Family Self-Sufficiency Program (FSS)	3	5	5	5								

21st Century CCLC Grant	Oct. 2025 Dollars Invoice	Nov. 2025 Dollars Invoice	Dec. 2025 Dollars Invoice	Jan. 2026 Dollars Invoiced	Feb. 2026 Dollars Invoiced	March 2026 Dollars Invoiced	April 2026 Dollars Invoiced	May 2026 Dollars Invoiced	June 2026 Dollars Invoiced	Total Invoiced	Monthly Target	Annual Target	Percent Complete
21st Century CCLC 13th Cohort	\$ 10,947.00	\$ 25,776.00	\$ 51,546.00	\$ 44,986.00	\$ 54,658.00	\$ 48,661.00				\$ 277,323.00	\$ 33,314.67	\$ 399,776.00	69%

18. HR- Summary Report-through 4/30/26

This report is provided to keep the Board informed on staffing capacity, compliance, and workforce stability.

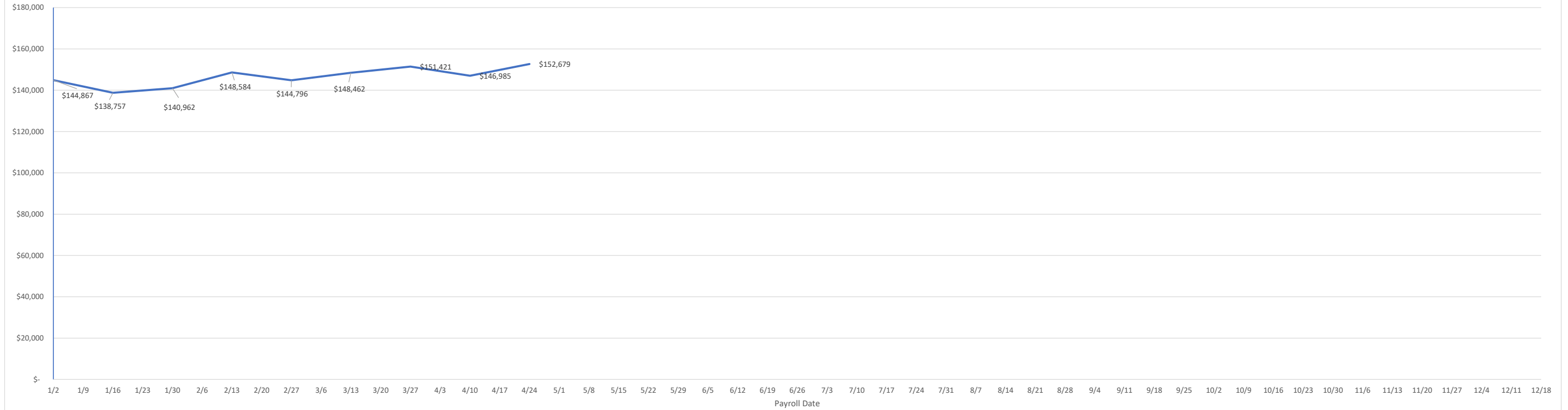
Open Positions			
Department	Position	Previous open date	
Moving Ahead Program	MAP Assistant - PT (Regular and Seasonal Summer Positions)	January 13th, 2026	
Staff Anniversaries			
Department	Position	Name	Years
Resident Services	Family Support Specialist	Tennille Chiles	4 Years
Facilities & Modernization	Maintenance Manager	Johnny Polston	2 Years
Resident Services	Family Self Sufficiency Coordinator	Ashley Singleton	1 Year
Affordable Housing Development	Director of Affordable Housing Development	Mary Ann Gelina	1 Year
New Hires			
Department	Position	Name	
Finance	Accountant	Connor Kirtley	
Performance Metrics			
Metric	April	March	
12-month Rolling # Employee Separations	17	17	
12-month Average # of Total Employees	65	63	
YTD Turnover Rate (Bench Mark 19%)	26%	27%	
HR Activities			
<ul style="list-style-type: none"> • Published CHA Staff Engagement and Benefits Survey • Preparing for One America transition to Voya 			
IT Activities			
<ul style="list-style-type: none"> • Continuing to Coordinate IT set up at Kinney Point • Exploring options to provide Socket and Brightspeed access to CHA tenants • Reviewing Marco printer contract and list of active devices • Recertified EIV Users • Completed set up of Socket Internet at Paquin Tower with increased speeds for staff and remote camera viewing 			

19. HR- Payroll Summary Report as of 4/30/2026

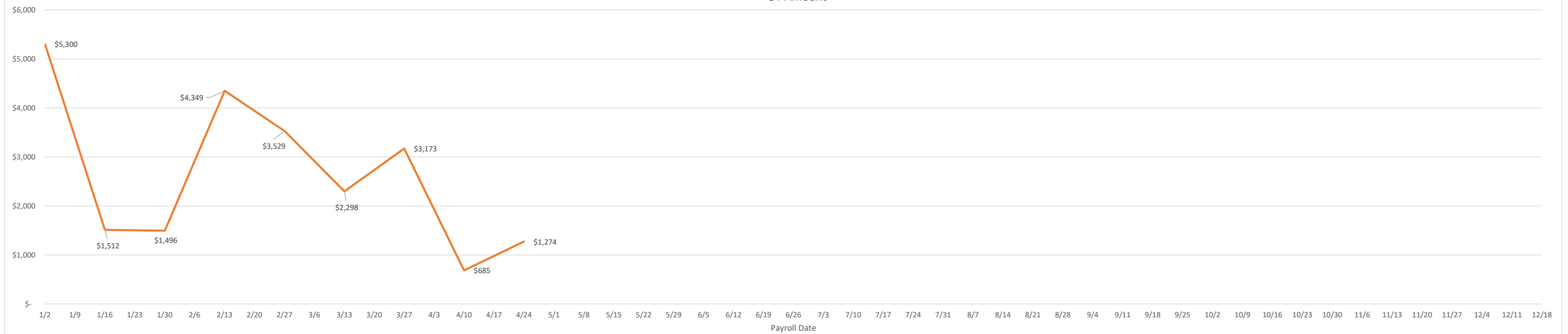
This report provides payroll transparency to the CHA Board of Commissioners.

Payroll Item	1/2	1/16	1/30	2/13	2/27	3/13	3/27	4/10	4/24	5/8	5/22	6/5	6/18	7/2	7/17	7/31	8/14	8/28	9/11	9/25	10/9	10/23	11/6	11/20	12/4	12/18
Gross Wages	\$ 144,867	\$ 138,757	\$ 140,962	\$ 148,584	\$ 144,796	\$ 148,462	\$ 151,421	\$ 146,985	\$ 152,679																	
OT Amount	\$ 5,300	\$ 1,512	\$ 1,496	\$ 4,349	\$ 3,529	\$ 2,298	\$ 3,173	\$ 685	\$ 1,274																	
OT Hours	128	36	36	108	88	63	86	21	32																	
Sick Hours	159	204	164	106	155	126	207	186	245																	
Vacation Hours	502	452	204	133	146	261	290	387	291																	

Gross Wages



OT Amount



May 22, 2026

REQUEST FOR PROPOSAL

Employee Benefits Brokerage and Consulting Services

CONTACT: Nathan Hoemann

HR Manager

Office: 573.554.7022

Fax: 573.234.4139

nhoemann@columbiaha.com

Sealed Proposals Accepted Until

Tuesday, June 23, 2026 @ 10:00 am CDT

NOTE: throughout this document...

The Housing Authority of the City of Columbia, Missouri = Columbia Housing Authority = CHA

CHA reserves the right to reject any or all Proposals
and to waive any informalities in the process

***The Housing Authority of the City of Columbia, Missouri
is an Equal Opportunity Agency***

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- Attachment III: Census Information
- Attachment IV: Proposal Evaluation
- Attachment V: Required Forms & Certifications

REQUEST FOR PROPOSAL ADVERTISEMENT

Employee Benefits Brokerage and Consulting Services

**Sealed Proposals Accepted Until
Tuesday, June 23, 2026 @ 10:00 am CDT**

PROPOSALS RECEIVED AFTER THIS DATE AND TIME WILL NOT BE CONSIDERED

Columbia Housing Authority (CHA) is seeking proposals from qualified employee benefits brokerage and consulting firms capable of providing comprehensive brokerage, consulting, employee support, and administrative services in support of CHA's employee benefit programs. Please read the scope of services in the Request for Proposal (RFP) for a more detailed description.

Proposals will be reviewed and evaluated based on the criteria defined in the "EVALUATION CRITERIA & SELECTION PROCESS" section of the RFP packet. A contract will be awarded to the responsible firm whose service capabilities, qualifications, price, and other factors considered are most advantageous to CHA.

An RFP packet may be obtained at www.columbiaha.com (on the homepage under "Bid Opportunities"); at CHA's Administration Building - 201 Switzler Street / Columbia, MO 65203, or by contacting Nathan Hoemann @ (573) 554-7022; Fax (573) 234-4139; e-mail nhoemann@columbiaha.com.

Register as Participant by submitting a very brief "Letter of Intent" to Nathan Hoemann via mail, e-mail, or fax stating:

- An interest in submitting a proposal and receiving all RFP updates and modifications,
- The name, title, role in this process, and contact information for all persons who you wish to receive RFP updates and modifications (addenda),
- That you are requesting an RFP packet (if applicable),
- **The last date and time to submit questions/explanations (Thursday, June 11, 2026 @ 5:00 pm CDT),**
- **The due date and time for submitting proposals (Tuesday, June 23, 2026 @ 10:00 am CDT).**

SCHEDULE OF EVENTS (Events relevant to Proposers are bolded. Full procurement schedule & timeline in RFP Packet)

Solicitations (Legal Notices):	Friday, May 22 / Wed, May 27 / Fri, June 5, 2026
RFP Meeting/Letter of Intent:	Tuesday, June 2, 2026
Deadline for Questions/Explanations:	Thursday, June 11, 2026 @ 5:00 pm CDT
Release of Final Addendum:	Wednesday, June 17, 2026 by 5:00 pm CDT
<u>DEADLINE FOR SUBMITTING PROPOSALS:</u>	<u>Tuesday, June 23, 2026, by 10:00 am CDT</u>
Evaluation of Proposals:	Wednesday, June 24 (thru) Friday, June 26, 2026
Finalist Interviews & Presentations:	Monday, June 29 (thru) Thursday, July 2, 2026
Contract Negotiations:	Thursday, July 16, 2026 (thru) Tuesday, July 28, 2026
Contract Award Announcement:	Thursday, July 30, 2026

Columbia Housing Authority:

- Reserves the right to reject any and all proposals and to waive any informality in the solicitation,
- Is prohibited from making an award to an individual, firm, or sub-service provider that is debarred from receiving awards from the U.S. Government,
- Is an equal opportunity employer.

1.0

INTRODUCTION & ORGANIZATION OVERVIEW

1.1 Organization Overview

The Columbia Housing Authority (“CHA”) is requesting proposals from qualified firms to provide employee benefits brokerage and consulting services for its employee benefit programs.

The Columbia Housing Authority was formally established in 1956 by City Ordinance. The establishment of a local housing authority allowed for the award of federal urban renewal grant funding to provide safe and clean dwellings at rents which low-income individuals and families could afford. CHA has served thousands of Columbia and Boone County’s most vulnerable citizens with housing and supportive services for more than 70 years.

CHA has steadily increased its annual budget, staffing capacity, assets, housing portfolio, voucher programs, and supportive services throughout its history. The organization has experienced multiple phases of operational growth, facility expansion, modernization, and reinvestment while continuing to strengthen partnerships with the City of Columbia, Boone County, local nonprofit organizations, businesses, and community stakeholders.

Today, CHA serves more than 2,000 households and nearly 4,000 individuals through affordable housing programs and supportive services designed to foster stability and upward mobility throughout the community.

1.2 Mission Statement

CHA’s mission is to provide quality affordable housing opportunities with supportive and economic resources to eligible households in Columbia and Boone County.

1.3 Vision Statement

CHA strives to be the community’s leading affordable housing provider with a diverse and expanding portfolio of safe, energy-efficient, and affordable housing options connected to supportive resources that foster stability and upward mobility.

1.4 Organizational Values

CHA is guided by the following organizational values:

- **Integrity** – Acting honestly and ethically in all aspects of the organization while continuously strengthening policies and standards in support of the mission.
- **Accountability** – Maintaining responsibility and stewardship to employees, residents, stakeholders, and the community.
- **Respect** – Recognizing the dignity and value of all residents, employees, and community partners.
- **Diversity, Equity, and Inclusion** – CHA is committed to diversity, equity, and inclusion in our staff, board, and services to residents. We recognize and value everyone’s life experience, perspective, and culture.
- **Safety** – Promoting safe environments through partnerships with residents, employees, and community stakeholders.

1.5 Workforce Overview

CHA currently employs approximately 82 employees, including approximately 66 benefit-eligible employees, with an estimated 125 covered lives enrolled in benefit programs.

CHA employs a diverse workforce that includes administrative, property management, voucher operations, development, maintenance, finance, and resident services personnel. The organization values employee retention, operational continuity, and employee engagement, and seeks benefit programs and communication strategies that support a broad range of employee needs and levels of benefits familiarity.

1.6 Purpose of the Request for Proposal

CHA is issuing this Request for Proposal (“RFP”) as part of its commitment to periodic market evaluation, procurement best practices, and continuous improvement of employee benefits consulting and brokerage services.

CHA seeks to identify a qualified brokerage and consulting partner capable of providing responsive service, strategic guidance, employee support, and long-term partnership in support of the organization’s employee benefits objectives.

2.0 RFP OBJECTIVES

The Columbia Housing Authority seeks proposals from qualified employee benefits brokerage and consulting firms capable of delivering comprehensive brokerage services, strategic consulting, and ongoing support for CHA’s employee benefits programs.

The selected firm will be expected to serve as a trusted advisor and advocate for CHA and its employees while assisting the organization in maintaining competitive, sustainable, and employee-focused benefit offerings.

CHA’s primary objectives in issuing this RFP include:

- Securing a brokerage partner that demonstrates responsiveness, professionalism, and proactive communication
- Obtaining strategic guidance related to employee benefits planning, market trends, renewal management, and cost containment strategies
- Enhancing employee advocacy and support services for benefit-related questions and issue resolution
- Improving employee communication and enrollment support throughout the plan year and annual open enrollment process
- Evaluating marketplace opportunities and carrier solutions that support long-term sustainability and value
- Ensuring access to compliance guidance and regulatory support related to employee benefit programs
- Strengthening reporting, analytics, benchmarking, and renewal forecasting capabilities
- Establishing a collaborative, long-term partnership focused on supporting CHA’s workforce and organizational objectives

CHA values a service-oriented approach and seeks a broker partner that can effectively balance strategic consulting capabilities with responsive day-to-day account management and employee support.

3.0 CURRENT BENEFITS ENVIRONMENT

CHA currently maintains a comprehensive employee benefits program designed to support the health, financial wellness, and overall wellbeing of eligible employees and their dependents.

Current benefit offerings include medical, dental, vision, life insurance, disability coverage, flexible spending arrangements, health savings accounts, employee assistance resources, and related employee benefit programs. Current programs and vendors include, but are not limited to, the following:

Benefit/Service	Current Vendor
Medical Insurance	UnitedHealthcare
Employee Assistance Program	UnitedHealthcare
Dental Insurance	Guardian
Vision Insurance	Guardian
Life & AD&D Insurance	Guardian
Short-Term Disability	Guardian
Long-Term Disability	Guardian
Employee Assistance Program	Guardian
Health Savings Account (HSA) Administration	Lively
Flexible Spending Account (FSA) Administration	ASI Flex
COBRA Administration	ASI COBRA
Health Payment Account (HPA)	Paytient
Benefits Enrollment Platform	Employee Navigator
Payroll Platform	Paycor

CHA currently offers employees a choice between multiple medical plan options, including a PPO plan with Flexible Spending Account (FSA) option, as well as a High Deductible Health Plan (HDHP) with Health Savings Account (HSA) compatibility. Additional plan information, summaries of benefits, and related documentation may be included as appendices or supplemental materials to this RFP.

The current benefits program serves approximately 66 benefit-eligible employees and approximately 125 covered lives, including enrolled dependents.

CHA seeks a brokerage partner capable of supporting both the strategic and operational aspects of benefits administration, including renewal planning, employee communications, vendor management, compliance support, enrollment assistance, and ongoing employee advocacy.

CHA is particularly interested in identifying a partner that demonstrates:

- Proactive communication practices
- Responsive service capabilities
- Strong employee support resources
- Strong vendor management capabilities
- Strategic planning expertise
- The ability to provide market insight and long-term benefits guidance

4.0 SCOPE OF REQUESTED BROKERAGE SERVICES

The Columbia Housing Authority (“CHA”) seeks a qualified employee benefits brokerage and consulting partner capable of providing comprehensive brokerage, consulting, employee support, and administrative services in support of CHA’s employee benefit programs.

The selected firm will be expected to provide both strategic guidance and responsive day-to-day service support throughout the plan year while serving as a collaborative partner to CHA leadership, Human Resources, payroll administration staff, and employees.

The scope of services outlined below is intended to establish the minimum expectations of the selected brokerage partner. Respondents are encouraged to identify additional value-added services, resources, or capabilities available to CHA.

4.1 Strategic Consulting Services

The selected broker shall provide strategic consulting services related to the planning, evaluation, and ongoing management of CHA’s employee benefits programs.

Services shall include, but not be limited to:

- Annual strategic planning and renewal review meetings with CHA leadership
- Evaluation of annual renewal options and alternative plan design strategies
- Market analysis and benchmarking against similarly sized employers and comparable benefit offerings
- Cost containment recommendations designed to maintain competitive and sustainable employee benefits
- Renewal forecasting and budgeting support to assist CHA with annual budget planning
- Evaluation of funding alternatives, including fully insured, level-funded, and other available funding arrangements as appropriate
- Carrier market analysis and negotiation support
- Pharmacy cost analysis, including specialty drug review, utilization trends, and formulary strategy recommendations
- Guidance regarding emerging market trends, legislative developments, and innovative benefit solutions relevant to public sector employers
- Recommendations intended to balance employee affordability, organizational sustainability, and benefit competitiveness

CHA anticipates conducting an annual strategic review process in advance of open enrollment planning and annual budget preparation. The selected broker shall be expected to provide sufficient analysis, recommendations, and renewal projections to support informed decision-making by CHA leadership.

4.2 Traditional Brokerage Services

The selected broker shall provide comprehensive brokerage and account management services necessary for the effective administration and ongoing support of CHA’s employee benefits programs.

Services shall include, but not be limited to:

- Annual renewal negotiation and carrier management services
- Preparation, review, and presentation of renewal options and recommendations
- Coordination with insurance carriers and benefit vendors regarding implementation, eligibility, enrollment, and ongoing administration

- Assistance with carrier issue resolution and escalation management
- Claims advocacy and employee support related to claim denials, billing concerns, eligibility disputes, and related matters
- Ongoing consultation and support to CHA Human Resources and payroll administration staff
- Coordination and oversight of open enrollment activities
- Assistance with plan implementation and transition management if carrier or vendor changes occur
- Timely communication regarding carrier requirements, renewal timelines, and administrative responsibilities
- Maintenance of a dedicated account management team familiar with CHA's benefit programs and organizational structure

CHA expects the selected broker to provide responsive and proactive service support throughout the plan year. Respondents should describe anticipated response time expectations, service standards, and account team structure within their proposal responses.

CHA anticipates a combination of remote support and limited onsite support throughout the year. At minimum, the selected broker should anticipate onsite participation in:

- An annual strategic planning and renewal review meeting
- A Board presentation related to annual benefit recommendations
- An employee open enrollment meeting and benefits presentation

4.3 Employee Service & Communication Support

CHA values employee-focused service and seeks a brokerage partner capable of supporting employee understanding, engagement, and access to benefit resources.

The selected broker shall provide employee communication and enrollment support services including, but not limited to:

- Open enrollment planning and employee communication support
- Preparation of employee benefit communication materials and enrollment guides
- Development of employee-friendly educational materials summarizing available benefit offerings
- Support for employee benefits presentations and enrollment meetings
- Assistance with employee questions regarding enrollment, eligibility, and benefit options
- Availability to assist employees with benefit-related concerns and escalation support when appropriate
- Assistance with claims advocacy and carrier communication for employees experiencing benefit issues
- Support for employees utilizing the online enrollment platform and related benefit administration tools
- Ongoing communication support as reasonably requested by CHA

CHA values communication materials that are clear, practical, and accessible to employees with varying levels of familiarity with employee benefits and enrollment systems.

The selected broker shall be expected to work collaboratively with CHA Human Resources staff while also remaining available to assist employees directly when necessary.

4.4 Compliance Support Services

The selected broker shall provide general compliance guidance and support related to employee benefits administration and applicable regulatory requirements.

Services shall include, but not be limited to:

- General Affordable Care Act (ACA) guidance and support
- COBRA administration coordination and support
- HIPAA-related benefits administration guidance
- Assistance with required employee notices and disclosures
- Section 125 and cafeteria plan support
- Medicare Part D notice support and related annual disclosure assistance
- General legislative and regulatory updates impacting employee benefits
- Assistance coordinating compliance-related information with carriers and third-party administrators as appropriate

CHA recognizes that certain compliance matters may require consultation with legal counsel or specialized advisors. Brokerage firms should describe the scope and limitations of their compliance support services within their proposal responses.

4.5 Data Analytics & Reporting Services

CHA seeks practical and actionable reporting support that assists leadership with renewal planning, budgeting, and strategic benefits decision-making.

The selected broker shall provide reporting and analytical services including, but not limited to:

- Annual claims analysis and renewal reporting
- Utilization trend analysis
- Pharmacy utilization and cost reporting
- Renewal forecasting and budget projection support
- Comparative analysis of renewal and plan design alternatives
- Benchmarking analysis against comparable employers and benefit offerings
- Executive-level summaries and presentations suitable for leadership and Board review
- Reporting and analysis reasonably requested by CHA during the annual renewal and planning process

CHA does not anticipate requiring extensive quarterly reporting or advanced actuarial analysis; however, respondents should describe available reporting capabilities and analytical resources available to support CHA as needed.

4.6 Technology & Administrative Support Services

The selected broker shall provide administrative and technology-related support services necessary for the effective administration of CHA's employee benefit programs.

Services shall include, but not be limited to:

- Support related to online enrollment systems and employee enrollment functionality
- Assistance with employee enrollment platform administration and troubleshooting
- Coordination with carriers and vendors regarding eligibility information and enrollment file management
- Support for implementation activities associated with carrier or vendor transitions
- Enrollment file testing and implementation coordination when applicable
- Assistance with onboarding and enrollment communication processes
- Support for carrier integrations and related administrative coordination as needed

- Availability of digital communication and enrollment support tools where appropriate

CHA currently utilizes **Employee Navigator** as its enrollment platform and **Paycor** as its payroll platform. Respondents should identify any relevant experience supporting these or similar systems and describe any available technology resources that may enhance the employee enrollment and administration experience.

CHA reserves the right to modify, expand, or reduce the scope of services described herein based upon organizational needs, negotiated agreements, or changing operational requirements.

5.0 BROKER QUALIFICATIONS & EXPERIENCE

The Columbia Housing Authority (“CHA”) seeks proposals from qualified employee benefits brokerage and consulting firms with demonstrated experience providing responsive service, strategic guidance, employee advocacy, and operational support for employee benefit programs.

Respondents should provide clear, concise, and complete responses to the information requested below. CHA encourages respondents to provide practical examples and detailed explanations demonstrating the firm’s ability to meet the service expectations outlined throughout this RFP.

CHA strongly values service quality, staffing continuity, employee support capabilities, and public-sector experience in evaluating proposals.

5.1 Firm Background & Organizational Overview

Provide a general overview of your firm and organizational structure.

Responses should include, at minimum:

1. Firm name, headquarters location, and office locations relevant to servicing the CHA account;
2. Year established and years providing employee benefits brokerage services;
3. Ownership structure and organizational background;
4. Description of the firm’s employee benefits practice and core service offerings;
5. Number of employees within the employee benefits division;
6. Description of the firm’s experience within the Missouri insurance and employee benefits marketplace.

CHA strongly prefers firms with demonstrated familiarity with Missouri insurance markets, carriers, and regulatory environments.

5.2 Relevant Experience & Client Base

Describe the firm’s experience providing employee benefits brokerage and consulting services to organizations comparable to CHA.

Responses should include:

1. Description of experience serving employers of similar size and complexity;
2. Description of experience supporting public-sector or governmental employers;

3. Description of experience supporting nonprofit, housing authority, or affordable housing organizations, if applicable;
4. Average client tenure for employee benefits clients;
5. Client retention statistics for the past five (5) years;
6. Description of the firm's approach to maintaining long-term client relationships and service continuity;
7. Examples of employee advocacy, claims escalation support, or service issue resolution provided for clients.

CHA values firms capable of establishing long-term, collaborative relationships supported by responsive service and consistent account management.

5.3 Account Management & Staffing Structure

CHA places significant importance on staffing continuity, responsiveness, and quality of account management support.

Respondents shall provide detailed information regarding the proposed account team structure, including:

1. Identification of all proposed account team members who would support CHA;
2. Titles, roles, responsibilities, and years of experience for each proposed team member;
3. Identification of the primary day-to-day contact for CHA;
4. Description of the escalation process for service issues or claims concerns;
5. Description of backup coverage procedures during staff absences or transitions;
6. Description of the firm's staffing continuity practices;
7. Description of employee advocacy and claims assistance resources available to clients and employees;
8. Description of anticipated response time expectations and service standards;
9. Disclosure of whether servicing responsibilities are handled locally, regionally, nationally, or through outsourced resources.

Respondents shall also disclose:

- Anticipated staffing changes relevant to the proposed account team, if known
- Use of subcontractors, offshore support resources, outsourced call centers, or third-party support services related to account servicing or employee support

CHA expects respondents to provide a dedicated account team familiar with CHA's operations and employee benefits programs.

5.4 Carrier & Vendor Relationships

Provide information regarding the firm's relationships and experience with insurance carriers and benefit vendors relevant to CHA's employee benefits program.

Responses should include:

1. Description of carrier appointments and market access capabilities;
2. Experience working with CHA's current carriers and vendors, including but not limited to:
 - UnitedHealthcare
 - Guardian
 - Lively
 - Paytient
 - ASI Flex
 - ASI Cobra
 - Employee Navigator
 - Paycor
3. Description of the firm's carrier negotiation approach and renewal management process;
4. Description of vendor management and coordination capabilities;
5. Description of the firm's process for evaluating alternative carriers, vendors, and plan structures when appropriate.

5.5 Service Model & Communication Approach

Describe the firm's overall service philosophy and communication approach.

Responses should include:

1. Description of the firm's client service model;
2. Description of communication practices and client responsiveness expectations;
3. Description of the annual renewal planning process;
4. Description of onsite support capabilities and availability;
5. Description of open enrollment support services;
6. Description of employee communication and education support;
7. Description of claims advocacy and employee escalation support processes;
8. Description of how the firm works collaboratively with Human Resources and payroll administration staff;
9. Description of how the firm balances strategic consulting with day-to-day operational support.

CHA values a service-oriented brokerage relationship emphasizing accessibility, practical support, employee advocacy, and proactive communication.

5.6 Technology & Reporting Capabilities

Describe the firm's technology resources, reporting capabilities, and administrative support tools relevant to CHA's employee benefits programs.

Responses should include:

1. Experience supporting Employee Navigator or similar enrollment platforms;

2. Description of available enrollment support and troubleshooting resources;
3. Description of reporting and analytics capabilities;
4. Description of claims analysis, renewal forecasting, and benchmarking resources;
5. Description of implementation support capabilities for carrier or vendor transitions;
6. Description of available digital communication or enrollment support tools;
7. General overview of cybersecurity and data protection practices relevant to employee benefits administration.

CHA values practical, reliable technology support and reporting capabilities that assist with benefits administration, renewal planning, and employee communication.

5.7 Compliance & Professional Qualifications

Provide information regarding the firm's professional qualifications and compliance-related resources.

Responses should include:

1. Confirmation that the firm and applicable staff are properly licensed to provide services in the State of Missouri;
2. Disclosure of any regulatory actions, disciplinary actions, or litigation relevant to employee benefits brokerage services within the past five (5) years;
3. Description of available compliance support resources;
4. Description of professional certifications or specialized qualifications held by proposed account team members;
5. Confirmation of current Errors & Omissions (E&O) insurance coverage.

CHA reserves the right to request supporting documentation related to licensing, insurance coverage, and regulatory standing.

5.8 Transition & Implementation Experience

Describe the firm's experience managing implementation activities and client transitions.

Responses should include:

1. Description of the firm's implementation and onboarding process;
2. Description of project management resources available during transitions;
3. Experience transitioning public-sector or similarly sized employers;
4. Description of communication practices during implementation periods;
5. Description of enrollment support and employee communication strategies during transitions;
6. Description of coordination processes involving carriers, enrollment platforms, payroll systems, and related vendors.

CHA seeks a brokerage partner capable of supporting smooth and organized implementations while minimizing disruption to employees and internal operations.

5.9 References

Respondents shall provide a minimum of three (3) professional references for clients receiving employee benefits brokerage or consulting services from the firm.

References should include:

- Organization name
- Organization location
- Contact name and title
- Phone number and email address
- Approximate number of employees covered
- Length of client relationship
- Indication whether the client is public-sector/governmental, nonprofit, Missouri based, and/or similar in size to CHA

CHA strongly prefers references that collectively demonstrate experience serving:

- Public-sector or governmental organizations
- Missouri-based employers
- Organizations similar in size and complexity to CHA

6.0 PROPOSAL RESPONSE REQUIREMENTS & QUESTIONNAIRE

The Columbia Housing Authority (“CHA”) requests that respondents provide complete, organized, and concise proposals addressing the requirements outlined in this Request for Proposal (“RFP”).

The purpose of this section is to establish a consistent proposal structure that:

- Facilitates fair and efficient proposal evaluation
- Improves comparability between submissions
- Ensure respondents address the operational, service, and strategic priorities identified by CHA

Respondents are encouraged to provide practical, focused responses directly related to the services requested within this RFP.

6.1 Proposal Format & Submission Organization

Respondents shall organize proposals in the same order as presented within this RFP and clearly identify each section and corresponding response.

Proposals should include responses and supporting information corresponding to all sections of this RFP, including but not limited to:

1. Cover Letter
2. Firm Background & Organizational Overview
3. Relevant Experience & Qualifications

4. Account Management & Staffing Structure
5. Service Model & Brokerage Capabilities
6. Responses to Questionnaire Items
7. Compensation & Fee Disclosure Information (See Section 7)
8. Required Attachments & Exhibits
9. Exceptions, Assumptions, or Deviations
10. References

CHA encourages concise and focused responses. Excessively lengthy or overly marketing-oriented submissions are discouraged.

Marketing materials should be limited to information directly relevant to the services requested within this RFP.

Respondents may include supplemental materials as appendices; however, CHA reserves the right to prioritize evaluation of information specifically requested within the proposal response requirements.

Respondents should clearly identify any materials considered proprietary or confidential.

6.2 General Proposal Requirements

All proposals submitted in response to this RFP shall remain valid for a minimum period of ninety (90) days following the proposal submission deadline unless otherwise extended by mutual agreement.

Respondents shall provide complete and accurate information and disclose any material assumptions, exclusions, deviations, or exceptions related to the requested services or requirements contained within this RFP.

CHA reserves the right to request clarification, supplemental information, or additional supporting documentation from any respondent during the evaluation process.

Respondents shall disclose the use of any subcontractors, outsourced support services, offshore resources, third-party call centers, or third-party enrollment support services that may be utilized in servicing the CHA account.

CHA may, at its discretion, invite selected respondents to participate in finalist interviews, presentations, demonstrations, or follow-up discussions. Finalists may be requested to:

- Introduce proposed account team members
- Demonstrate reporting or technology capabilities
- Discuss implementation strategies
- Explain service models
- Respond to follow-up questions related to the proposal

6.3 Required Attachments & Supporting Materials

Respondents shall include the following supporting materials with their proposal submissions:

- Organizational chart and proposed account team structure
- Resumes or biographies for key account team members
- Sample renewal or strategic planning report

- Sample employee-facing communication or enrollment guide
- Sample implementation or transition timeline
- Any additional materials directly relevant to the services requested within this RFP

CHA reserves the right to request additional supporting documentation during the evaluation process.

6.4 Detailed Questionnaire & Required Responses

Respondents shall provide detailed responses to the following questions and discussion items.

Responses should be clear, concise, and specifically tailored to the needs and priorities identified by CHA throughout this RFP.

6.4.1 Strategic Services

1. Describe your firm's overall approach to strategic employee benefits consulting.
2. Describe your annual renewal strategy and planning process.
3. Describe how your firm evaluates alternative plan designs and funding arrangements.
4. Describe your benchmarking capabilities and experience comparing clients against similarly sized organizations or public-sector employers.
5. Provide examples of cost containment recommendations your firm has implemented for clients.
6. Describe your approach to pharmacy analysis, specialty drug review, and pharmacy cost management strategies.

6.4.2 Employee Advocacy & Claims Support

1. Describe your employee advocacy model and approach to employee support.
2. Describe your process for handling employee claims issues and escalation support.
3. Provide examples of how your firm has assisted clients with complex claims or employee service concerns.
4. Describe how employees access support resources and account representatives.
5. Describe a challenging client or employee issue and explain how your firm resolved it.

6.4.3 Renewal Management & Carrier Relations

1. Describe your process for managing annual renewals and carrier negotiations.
2. Describe how your firm communicates renewal recommendations and strategic options to clients.
3. Describe your experience negotiating with insurance carriers on behalf of clients.
4. Describe how your firm approaches marketplace evaluations and alternative carrier reviews.
5. Describe your approach to balancing cost management with employee benefit quality and stability.

6.4.4 Communication & Enrollment Support

1. Describe your approach to employee communication and education.
2. Describe your open enrollment support process.

3. Describe the onsite and remote enrollment support services available to clients.
4. Describe the types of employee communication materials your firm provides.
5. Describe your experience supporting employees with varying levels of benefits familiarity and technology proficiency.

6.4.5 Staffing & Service Model

1. Describe your proposed service model for the CHA account.
2. Identify the proposed account team members and describe their respective roles and responsibilities.
3. Describe your firm's staffing continuity practices and approach to account transitions.
4. Describe your backup coverage procedures during staff absences or staffing changes.
5. Describe expected response time standards for client and employee inquiries.
6. Describe how your firm ensures consistent service quality across account teams.

6.4.6 Public Sector & Relevant Experience

1. Describe your experience serving public-sector employers.
2. Describe your experience serving Missouri-based employers.
3. Describe your experience serving housing authorities, nonprofit organizations, or affordable housing organizations, if applicable.
4. Describe how your experience supporting governmental or nonprofit employers influences your service approach.

6.4.7 Technology & Administrative Support

1. Describe your experience supporting Employee Navigator or similar enrollment platforms.
2. Describe your technology support capabilities related to enrollment administration and employee support.
3. Describe your reporting and analytics capabilities.
4. Describe your implementation support capabilities for carrier or vendor transitions.
5. Describe any digital tools or enrollment support resources available to employees and administrators.

6.4.8 Implementation & Transition Support

1. Describe your implementation and onboarding process for new clients.
2. Describe your project management approach during transitions.
3. Describe your communication process during implementation periods.
4. Describe how your firm coordinates with carriers, enrollment vendors, payroll systems, and related vendors during implementation.
5. Provide a sample implementation timeline or transition work plan.

6.4.9 Cost Management & Financial Transparency

1. Describe your approach to helping clients manage long-term benefits costs.
2. Describe your approach to balancing employee affordability with organizational sustainability.
3. Describe your process for identifying cost-saving opportunities.
4. Describe how compensation, commissions, fees, or incentives may impact your recommendations or carrier relationships.

6.4.10 Compliance Support

1. Describe your firm's compliance support capabilities related to employee benefits administration.
2. Describe how your firm communicates legislative or regulatory updates to clients.
3. Describe the compliance resources available to your clients.
4. Describe the limitations of your compliance support services, if any.

6.5 Exceptions, Assumptions & Deviations

Respondents shall clearly identify any: assumptions, exclusions, deviations, exceptions, or limitations related to the services, requirements, or expectations outlined within this RFP.

Failure to disclose material exceptions or limitations may be considered during the evaluation process.

7.0 COMPENSATION & FEE DISCLOSURE

The Columbia Housing Authority ("CHA") values transparency, accountability, and clear communication regarding broker compensation structures and financial relationships that may relate to employee benefits consulting, brokerage services, carrier recommendations, or vendor arrangements.

The purpose of this section is to provide CHA with a reasonable understanding of how respondents are compensated for services related to the CHA account and to ensure transparency regarding potential financial relationships or incentive arrangements that may influence recommendations or service delivery.

CHA recognizes that compensation structures may vary among brokerage firms and does not require a specific compensation model. However, respondents are expected to provide clear and complete disclosure regarding all material compensation arrangements relevant to the services proposed within this RFP.

7.1 Compensation Disclosure Requirements

Respondents shall disclose and describe all compensation arrangements, financial relationships, and incentive structures that may apply to services provided to CHA, including but not limited to:

- Carrier-paid commissions
- Consulting fees
- Flat-fee or fee-based service arrangements
- Indirect compensation arrangements
- Performance-based compensation
- Contingent compensation
- Carrier incentives or bonuses

- Vendor compensation arrangements
- Technology platform compensation
- Pharmacy benefit management (PBM) or vendor incentive arrangements
- Carrier overrides or volume-based incentives
- Compensation associated with enrollment, communication, wellness, navigation, or related vendor partnerships

Disclosure should include sufficient detail to allow CHA to reasonably understand:

- The general nature of the compensation arrangement
- The parties involved
- How compensation is calculated or structured
- Whether such arrangements may apply to the CHA account

Respondents are not required to disclose proprietary financial information or confidential carrier agreements beyond what is reasonably necessary to satisfy the disclosure expectations outlined within this section.

7.2 Required Compensation & Transparency Responses

Respondents shall provide responses to the following questions and disclosure items.

7.2.1 Compensation Structure

1. Describe the compensation model your firm proposes for servicing the CHA account.
2. Describe whether compensation is primarily commission-based, fee-based, hybrid, or another structure.
3. Describe any available fee-based service options offered by your firm.
4. Describe how compensation amounts are determined for the services proposed within this RFP.

7.2.2 Carrier Compensation & Incentives

1. Describe any commission arrangements associated with medical, dental, vision, life, disability, voluntary, or related benefit products.
2. Describe any contingent compensation, bonus structures, profitability incentives, retention incentives, or production-based incentives your firm may receive from carriers or vendors.
3. Describe any carrier override arrangements, premium volume incentives, or market-share-based compensation programs applicable to your firm.
4. Describe how your firm manages potential conflicts of interest related to carrier compensation arrangements.

7.2.3 Vendor & Third-Party Compensation

1. Disclose whether your firm receives compensation, referral fees, incentives, or other financial consideration from:
 - enrollment platform vendors;
 - pharmacy benefit managers (PBMs);
 - wellness vendors;
 - navigation vendors;

- communication vendors;
 - HSA/FSA vendors;
 - COBRA administrators; or
 - other third-party benefit service providers.
2. Describe the general nature of any such compensation arrangements.
 3. Describe whether vendor compensation arrangements may influence recommendations provided to clients.

7.2.4 Transparency & Client Communication

1. Describe your firm’s philosophy regarding compensation transparency and disclosure.
2. Describe how compensation-related information is communicated to clients during the relationship.
3. Describe any policies, procedures, or governance practices your firm maintains to address potential conflicts of interest.

7.2.5 Compensation Changes & Ongoing Disclosure

1. Describe how your firm communicates material changes to compensation arrangements during the course of a client relationship.
2. Describe whether your firm provides updated compensation disclosures upon request or during renewal periods.

7.3 Additional Information

CHA reserves the right to request additional clarification or supporting information related to compensation disclosures, incentive arrangements, or financial relationships identified within proposal responses.

Failure to disclose material compensation arrangements or financial relationships relevant to the services proposed may be considered during the evaluation process.

8.0 IMPLEMENTATION & TRANSITION EXPECTATIONS

The Columbia Housing Authority (“CHA”) seeks a brokerage partner capable of providing organized, responsive, and collaborative implementation and transition support services designed to minimize disruption to employees, internal operations, carriers, and benefit administration processes.

The selected broker shall be expected to provide implementation planning, transition coordination, enrollment support, communication assistance, and vendor coordination services necessary to support successful annual renewals, open enrollment activities, and any future carrier or vendor transitions.

CHA values practical project management, proactive communication, and clearly defined timelines throughout all implementation and transition activities.

8.1 General Implementation Expectations

The selected broker shall provide implementation and transition support services including, but not limited to:

- Implementation planning and coordination
- Carrier and vendor transition management

- Enrollment planning and coordination
- Employee communication support
- Payroll and enrollment integration coordination
- Eligibility and enrollment file coordination
- Implementation timeline development and management
- Coordination with carriers, vendors, enrollment platforms, and payroll systems
- Ongoing communication with CHA leadership and Human Resources staff throughout implementation activities

The selected broker shall serve as a primary coordination resource during implementation and transition activities and shall work collaboratively with CHA staff to ensure timely completion of required tasks and deliverables.

8.2 Transition & Carrier Change Support

If carrier, vendor, or brokerage changes occur, the selected broker shall provide comprehensive transition support designed to ensure continuity of benefits administration and minimize disruption to employees.

Transition support services shall include, but not be limited to:

- Development of a detailed implementation and transition timeline
- Coordination of implementation meetings and planning session
- Carrier onboarding and transition coordination
- Enrollment platform coordination and support
- Payroll deduction and eligibility coordination support
- Enrollment file testing and validation support
- Coordination of employee communications related to benefit or carrier changes
- Oversight of implementation deliverables and deadlines
- Coordination with third-party administrators and benefit vendors
- Support related to open enrollment scheduling and implementation activities

Respondents should describe their experience managing carrier transitions and implementation activities for public-sector or similarly sized organizations.

8.3 Annual Renewal & Open Enrollment Expectations

CHA anticipates conducting annual renewal planning and open enrollment activities according to a structured annual schedule.

The selected broker shall be expected to support the following general annual timeline expectations:

- Annual strategic review and renewal planning discussions occurring in advance of annual budget preparation and open enrollment planning, typically during late September to Early October
- Presentation of renewal recommendations and benefit strategy options to CHA leadership
- Attendance at and participation in a Board presentation regarding annual benefit recommendations, typically occurring during October
- Coordination and support for annual open enrollment activities, typically occurring during early to mid-November
- Employee open enrollment meetings and benefits presentations
- Preparation and distribution of employee communication and enrollment materials

The selected broker shall provide sufficient planning support, communication, and coordination to assist CHA in maintaining a timely and organized annual renewal and enrollment process.

8.4 Employee Communication & Enrollment Support

The selected broker shall provide employee communication and enrollment support services during implementation and open enrollment periods including, but not limited to:

- Preparation of employee enrollment guides and communication materials
- Support for employee benefits presentations and informational meetings
- Assistance with employee enrollment questions and enrollment platform navigation
- Availability to assist employees experiencing enrollment or benefit-related issues
- Support for both onsite and remote enrollment assistance activities as reasonably requested by CHA

CHA values communication materials that are clear, practical, and employee-friendly.

The selected broker should demonstrate the ability to communicate effectively with employees possessing varying levels of familiarity with benefits administration systems and enrollment technology.

8.5 Onsite Meeting Expectations

CHA anticipates a combination of remote and onsite support throughout the plan year.

At minimum, the selected broker should anticipate participation in the following onsite meetings and activities annually:

1. An annual strategic review and renewal planning meeting with CHA leadership.
2. A Board presentation related to annual benefit recommendations and renewal planning.
3. An employee open enrollment meeting and benefits presentation.

Additional onsite meetings may be requested periodically as reasonably necessary based upon operational needs, implementation activities, or significant benefit changes.

8.6 Communication & Project Management Expectations

CHA expects the selected broker to maintain clear, proactive, and timely communication throughout implementation and transition activities.

Respondents should describe:

- Their implementation project management approach
- Primary implementation contacts
- Communication practices during implementation periods
- Methods used to track implementation timelines and deliverables
- Escalation procedures for implementation issues or delays
- Coordination practices involving carriers, enrollment vendors, payroll systems, and third-party administrators

CHA values implementation processes that are organized, collaborative, and minimally disruptive to employees and internal operations.

8.7 Implementation Deliverables

Respondents should be prepared to provide implementation-related materials and support resources including, where applicable:

- Implementation timelines or work plans
- Enrollment communication materials
- Onboarding schedules
- Carrier implementation checklists
- Enrollment testing coordination
- Employee presentation materials
- Other implementation documentation reasonably necessary to support successful enrollment and transition activities

CHA reserves the right to request additional implementation planning information during the evaluation or negotiation process.

9.0 PROPOSAL SUBMISSION INSTRUCTIONS

The Columbia Housing Authority (“CHA”) is issuing this Request for Proposal (“RFP”) to solicit proposals from qualified employee benefits brokerage and consulting firms capable of providing comprehensive employee benefits brokerage, consulting, and support services.

This section outlines the procurement process, submission requirements, timeline expectations, and administrative procedures applicable to this RFP.

CHA reserves the right to modify the procurement schedule or process as necessary to support organizational needs, evaluation requirements, or Board review timelines.

9.1 Procurement Schedule & Timeline

The following timeline is intended to provide respondents with general expectations regarding the anticipated procurement schedule. CHA reserves the right to modify these dates as necessary through written addenda.

Schedule of Events:

Procurement Activity	Date
RFP Issued	May 22, 2026
Letter of Intent Due/RFP Meeting	June 2, 2026 @ 10:00 AM
Written Questions Due	June 11, 2026 @ 5:00 PM
Responses/Addenda Issued	June 17, 2026
Proposal Submission Deadline	June 23, 2026 @ 10:00 AM Central Time

Procurement Activity	Date
Bid Opening – Open to Public	June 23, 2026 @ 10:05 AM Central Time
Proposal Review Period	June 24 – June 26, 2026
Finalist Interviews & Presentations	June 29 – July 2, 2026
Selection Recommendation Finalized	July 7, 2026
Board Packet Deadline (anticipated)	July 8, 2026
Board Review	July 15, 2026
Contract Negotiations	July 16 – July 28, 2026
Contract Award Announcement	July 30, 2026
Implementation Planning Begins	August 3, 2026
Anticipated Effective Date	January 1, 2026

CHA reserves the right to modify the procurement timeline or scheduling requirements at its discretion through written addenda.

9.2 Letter of Intent to Participate

Firms intending to submit a proposal are strongly encouraged to submit a brief Letter of Intent to Participate as soon as practical following issuance of this RFP.

The Letter of Intent should include:

- Confirmation of the firm’s interest in participating in the RFP process
- The name, title, role, phone number, and email address for all individuals who should receive RFP updates, clarifications, or addenda
- Acknowledgment of the deadline for submitting questions
- Acknowledgment of the proposal submission deadline

Submission of a Letter of Intent is intended to assist CHA in distributing updates and addenda fairly and efficiently throughout the procurement process.

Letters of Intent may be submitted via mail or email to:

Nathan Hoemann
 HR Manager
 Columbia Housing Authority
 201 Switzler Street
 Columbia, MO 65203
 Email: nhoemann@columbiaha.com

9.3 Questions & Requests for Clarification

Respondents may submit questions or requests for clarification related to this RFP in writing via email to the contact identified below.

Nathan Hoemann
HR Manager
Columbia Housing Authority
Email: nhoemann@columbiaha.com

All official questions must be submitted by the deadline identified within the procurement schedule.

CHA may conduct an optional question and discussion meeting during the procurement process. Participation in any discussion meeting does not eliminate the requirement that official questions be submitted in writing.

Responses to material questions, clarifications, interpretations, or modifications related to this RFP may be issued through written addenda distributed to participating firms.

CHA reserves the right to decline to respond to questions received after the stated deadline.

9.4 Proposal Submission Requirements

To be eligible for consideration, respondents shall submit:

- One (1) original proposal clearly identified as containing original signatures; and
- Two (2) copies identical to the original proposal.

Respondents shall also provide an electronic PDF copy of the proposal submission via: email attachment, secure electronic file transfer link, or electronic storage device included with the hard copy submission

All proposals shall be sealed and delivered no later than the proposal submission deadline identified within this RFP.

Late submissions may be rejected and returned unopened.

9.5 Proposal Delivery Instructions

Proposal submissions shall be delivered to:

Columbia Housing Authority
Attn: Nathan Hoemann, HR Manager
201 Switzler Street
Columbia, MO 65203

Proposals shall clearly identify the respondent's name and indicate that the submission relates to the Employee Benefits Brokerage Services RFP.

CHA assumes no responsibility for delays in delivery or proposal submission resulting from mail service interruptions, courier issues, or electronic transmission problems.

9.6 Proposal Validity Period

All proposals submitted in response to this RFP shall remain valid for a minimum period of ninety (90) days following the proposal submission deadline unless otherwise extended by mutual agreement between CHA and the respondent.

9.7 Finalist Interviews & Presentations

CHA reserves the right to invite selected respondents to participate in finalist interviews, presentations, demonstrations, or follow-up discussions as part of the evaluation process.

Finalist presentations may include:

- Introduction of proposed account team members
- Discussion of service models and staffing structures
- Demonstration of reporting or administrative capabilities
- Discussion of implementation and transition strategies
- Review of employee advocacy and claims support processes
- Responses to follow-up questions from CHA leadership and evaluation participants

CHA may also conduct reference checks, request supplemental information, or seek clarification regarding proposal responses during the evaluation process.

Participation in finalist interviews or presentations does not guarantee contract award or selection.

9.8 Proposal Withdrawal & Modification

A respondent may withdraw or modify a submitted proposal at any time prior to the proposal submission deadline through written notice submitted by an authorized representative of the respondent.

Following the submission deadline, proposals may not be modified except upon request by CHA for purposes of clarification or correction of administrative errors.

9.9 Costs of Proposal Preparation

All costs associated with preparation, submission, interviews, presentations, demonstrations, travel, or other activities related to this RFP shall be the sole responsibility of the respondent.

Issuance of this RFP does not obligate CHA to award a contract, reimburse proposal costs, or pay any expenses incurred in connection with the preparation or submission of proposals.

9.10 Addenda & Modifications

CHA reserves the right to modify, clarify, revise, or amend this RFP at any time through written addenda. Addenda issued by CHA shall become part of the RFP and shall be binding upon respondents. Respondents are responsible for ensuring they have received and reviewed all addenda issued related to this RFP.

9.11 Reservation of Rights

CHA reserves the right to:

- Reject any or all proposals
- Waive informalities or irregularities in proposals received
- Request clarification or additional information from respondents
- Negotiate with one or more respondents

- Cancel or modify the RFP process at any time
- Accept any proposal deemed to be in the best interest of CHA
- Conduct investigations as necessary to evaluate respondent qualifications and proposal responses

Nothing contained within this RFP shall create any contractual obligation between CHA and any respondent unless and until a formal written agreement has been executed and approved by all necessary parties, including formal approval by the CHA Board of Commissioners.

10.0 EVALUATION CRITERIA & SELECTION PROCESS

The Columbia Housing Authority (“CHA”) intends to conduct a fair, transparent, and comprehensive evaluation process designed to identify the respondent best qualified to provide employee benefits brokerage and consulting services aligned with CHA’s operational needs, employee support priorities, and long-term organizational objectives.

Proposal evaluations will consider both qualitative and quantitative factors, including service capabilities, responsiveness, communication approach, employee advocacy resources, public-sector experience, strategic consulting capabilities, and overall organizational fit.

CHA reserves the right to evaluate proposals using the criteria and process described below while maintaining flexibility to consider the overall best interests of the organization.

10.1 Evaluation Methodology

Proposals submitted in response to this RFP will be evaluated by an internal evaluation committee designated by CHA.

The evaluation process may include:

- Review of written proposal submissions
- Evaluation of required questionnaire responses
- Assessment of qualifications and experience
- Review of references
- Interviews or presentations with selected finalists
- Clarification requests
- Other evaluation activities deemed appropriate by CHA

CHA may consider:

- Responsiveness to the RFP requirements
- Overall quality and completeness of the proposal
- Demonstrated understanding of CHA’s operational needs
- Communication style and responsiveness
- Staffing continuity and account management approach
- Employee advocacy capabilities
- Organizational fit and compatibility
- Respondent’s ability to provide reliable, long-term support

CHA reserves the right to request additional information, clarification, revised proposals, or best and final offers (“BAFOs”) if deemed necessary during the evaluation process.

Lowest cost proposals will not necessarily receive award consideration or selection.

10.2 Evaluation Criteria & Scoring Matrix

Proposals may be evaluated using the following weighted evaluation criteria:

Evaluation Category	Weight
Service Model & Account Team	25%
Brokerage & Strategic Capabilities	20%
Employee Advocacy & Communication	15%
Finalist Interview & Presentation	10%
Public Sector Experience	10%
Compensation Transparency & Cost Structure	10%
Technology & Reporting Capabilities	5%
Compliance Support	5%

10.2.1 Service Model & Account Team (25%)

Evaluation may include consideration of:

- Proposed account team structure
- Staffing continuity practices
- Responsiveness expectations
- Claims support capabilities
- Employee support resources
- Service philosophy
- Backup coverage procedures
- Overall operational support approach

10.2.2 Brokerage & Strategic Capabilities (20%)

Evaluation may include consideration of:

- Renewal strategy capabilities
- Market analysis and benchmarking
- Cost containment recommendations
- Carrier negotiation experience
- Strategic consulting approach
- Pharmacy analysis capabilities
- Long-term planning support

10.2.3 Employee Advocacy & Communication (15%)

Evaluation may include consideration of:

- Employee advocacy resources
- Claims escalation support
- Employee communication approach
- Open enrollment support
- Communication materials
- Employee accessibility
- Demonstrated commitment to employee service

10.2.4 Finalist Interview & Presentation (10%)

Finalist interviews and presentations may include evaluation of:

- Communication effectiveness
- Professionalism
- Responsiveness
- Proposed account team interaction
- Organizational fit
- Service approach
- Ability to respond effectively to questions and discussion topics

10.2.5 Public Sector Experience (10%)

Evaluation may include consideration of:

- Experience serving public-sector employers
- Missouri market familiarity
- Experience serving nonprofit or governmental organizations
- Housing authority or affordable housing experience, if applicable
- Overall relevance of client experience

10.2.6 Compensation Transparency & Cost Structure (10%)

Evaluation may include consideration of:

- Clarity of compensation disclosures
- Transparency regarding commissions and incentives
- Overall cost structure
- Conflict management practices
- Reasonableness of proposed compensation arrangements

10.2.7 Technology & Reporting Capabilities (5%)

Evaluation may include consideration of:

- Enrollment platform support capabilities
- Reporting and analytics resources
- Implementation support tools
- Administrative support resources

- Practical technology solutions supporting CHA operations and employees

10.2.8 Compliance Support (5%)

Evaluation may include consideration of:

- Compliance support resources
- Legislative update practices
- Benefits administration guidance capabilities
- Overall understanding of employee benefits compliance requirements

10.3 Finalist Interviews & Presentations

CHA reserves the right to invite selected respondents to participate in finalist interviews, presentations, demonstrations, or follow-up discussions.

Finalist interviews may include:

- Introduction of proposed account team members
- Discussion of service philosophy and staffing approach
- Discussion of implementation and transition strategies
- Review of employee advocacy and claims support processes
- Discussion of strategic consulting capabilities
- Demonstration of communication or reporting resources
- Responses to questions from the evaluation committee

CHA may also conduct reference checks and request supplemental information during the finalist evaluation process.

Participation in finalist interviews or presentations does not guarantee selection or contract award.

10.4 Negotiation Process

Following completion of the evaluation process, CHA may enter into negotiations with one or more respondents regarding:

- Scope of services
- Staffing arrangements
- Compensation structures
- Implementation expectations
- Contract terms
- Related service considerations

CHA reserves the right to:

- Request revised proposals
- Request best and final offers
- Discontinue negotiations with any respondent
- Negotiate with alternate respondents if necessary

The evaluation criteria and scoring matrix described herein are intended as general evaluation guidelines. CHA reserves the right to consider qualitative factors, references, interviews, organizational fit, responsiveness, and overall compatibility during the evaluation process.

11.0 TERMS, CONDITIONS & RESERVATIONS

The Columbia Housing Authority (“CHA”) reserves the right to administer this Request for Proposal (“RFP”) process in a manner determined to be in the best interests of the organization and consistent with applicable procurement requirements and organizational objectives.

Submission of a proposal in response to this RFP constitutes acknowledgment and acceptance of the terms, conditions, and reservations outlined herein.

11.1 Right to Reject Proposals

CHA reserves the right to:

- Reject any or all proposals
- Waive informalities, irregularities, or technical deficiencies
- Request clarification or additional information from respondents
- Cancel, revise, suspend, or reissue this RFP
- Revise evaluation procedures or timelines
- Conduct investigations regarding respondent qualifications
- Accept any proposal deemed to be in the best interests of CHA

CHA shall not be obligated to select the lowest cost proposal or any proposal submitted in response to this RFP.

11.2 No Obligation to Award

Issuance of this RFP does not obligate CHA to:

- Award a contract
- Enter into negotiations
- Reimburse any respondent for proposal preparation costs
- Procure any services described herein

Any contract award resulting from this RFP shall be subject to final approval by all necessary parties, including formal approval by the CHA Board of Commissioners.

11.3 Contract Negotiation Rights

CHA reserves the right to negotiate:

- Scope of services
- Compensation arrangements
- Implementation timelines
- Staffing structures
- Contract terms
- Related service provisions

with one or more respondents following completion of the evaluation process.

CHA also reserves the right to request revised proposals, clarifications, or best and final offers if deemed necessary during negotiations or evaluation activities.

11.4 Contract Term & Renewal Options

CHA anticipates entering into an agreement with the selected respondent for an initial term of three (3) years.

Following the initial contract term, CHA may, at its discretion and subject to mutual agreement and any required approvals, elect to renew the agreement for up to two (2) additional one-year renewal periods.

CHA reserves the right to review service performance, compensation arrangements, and overall contractual terms prior to exercising any renewal option.

11.5 Proposal Accuracy & Responsibility

Respondents are responsible for ensuring the accuracy and completeness of all information submitted in response to this RFP.

CHA reserves the right to rely upon representations, statements, and information provided within proposal submissions during the evaluation and negotiation process.

If inaccuracies, omissions, or misrepresentations are identified, CHA reserves the right to:

- reject the proposal
- discontinue negotiations
- or terminate further consideration of the respondent

11.6 Confidentiality & Public Records

Respondents should clearly identify any materials considered proprietary or confidential.

CHA will make reasonable efforts to protect properly identified confidential information to the extent permitted by applicable law.

Respondents should be aware that proposal materials submitted to CHA may be subject to public records requests, disclosure requirements, or other applicable governmental transparency obligations.

CHA does not guarantee confidentiality of submitted materials except as required by law.

11.7 Insurance & Professional Requirements

Prior to commencement of services, the selected respondent shall provide evidence of insurance coverage, professional qualifications, and related documentation to CHA.

Required coverage and documentation may include, but shall not be limited to, the following:

- Professional Liability / Errors & Omissions Insurance: minimum limits of \$1,000,000 per claim and \$2,000,000 aggregate
- Commercial General Liability Insurance: minimum limits of \$1,000,000 per occurrence and \$2,000,000 aggregate
- Workers' Compensation Insurance: statutory limits as required by the State of Missouri
- Employer's Liability Insurance: minimum limits of \$500,000
- Cyber Liability / Data Security Liability Insurance: minimum limits of \$1,000,000, particularly if the respondent will access, store, transmit, or manage personally identifiable information ("PII"), protected

health information (“PHI”), payroll data, enrollment information, or other confidential employee information.

The selected respondent may also be required to provide:

- Evidence of applicable professional licenses or certifications
- Proof of good standing within the State of Missouri
- E-Verify documentation or affidavit, if required by CHA procurement policies
- Certificates of insurance acceptable to CHA

CHA may require that the selected respondent name CHA as an additional insured under applicable liability policies, subject to policy limitations and acceptable endorsement language.

Insurance coverage shall be maintained throughout the duration of the contract term, including any approved renewal periods.

CHA reserves the right to review and approve all insurance documentation and to request reasonable modifications to coverage requirements during contract negotiations or prior to contract execution.

Failure to provide satisfactory documentation within the timeframe requested by CHA may result in withdrawal of a proposed award, discontinuation of negotiations, or selection of an alternate respondent.

11.8 Conflict of Interest & Disclosure Requirements

Respondents shall disclose any actual, potential, or perceived conflicts of interest that may reasonably relate to the services requested within this RFP.

Disclosure shall include, but not be limited to:

- Any business relationship, financial arrangement, referral arrangement, compensation agreement, or other affiliation between the respondent (including its principals, affiliates, parent company, subsidiaries, subcontractors, or related entities) and any insurance carrier, vendor, enrollment platform provider, pharmacy benefit manager (“PBM”), third-party administrator, wellness vendor, or other entity that may be recommended to CHA.
- Any contingent compensation arrangements, carrier incentive programs, bonus structures, override agreements, production incentives, vendor compensation arrangements, or other financial relationships that could reasonably influence recommendations or services provided to CHA.
- Any current or anticipated business relationship between the respondent and any current CHA employee, Board member, consultant, contractor, or other party that may present an actual or perceived conflict of interest.
- Any role the respondent may have played in advising, assisting with, scoping, drafting, or otherwise participating in the development of specifications, requirements, evaluation criteria, or other components of this procurement process that could create an unfair competitive advantage or otherwise affect eligibility to participate in this procurement pursuant to applicable procurement requirements, including 2 CFR § 200.319(b).

Respondents shall disclose any such relationships, arrangements, or circumstances within their proposal submissions and provide sufficient detail for CHA to evaluate the nature and potential impact of the disclosed matter.

Failure to disclose material conflicts of interest, financial relationships, or procurement-related involvement may result in disqualification of the respondent, discontinuation of negotiations, withdrawal of a proposed award, or other action deemed appropriate by CHA.

11.9 Addenda & Modifications

CHA reserves the right to modify, clarify, revise, or amend this RFP through written addenda issued during the procurement process.

Addenda issued by CHA shall become part of the RFP and shall be binding upon respondents.

Respondents are responsible for ensuring they have received and reviewed all addenda issued related to this RFP.

11.10 Costs of Proposal Preparation

All costs associated with:

- Proposal preparation
- Submission
- Interviews
- Presentations
- Demonstrations
- Travel
- Negotiations
- Related procurement activities

shall be the sole responsibility of the respondent.

CHA shall not be responsible for reimbursement of any respondent expenses associated with participation in this RFP process.

11.11 No Guarantee of Volume or Exclusivity

Nothing contained within this RFP or any resulting agreement shall be interpreted as guaranteeing a specific volume of services, future work, or exclusivity unless expressly agreed upon in writing.

11.12 General Procurement Reservations

CHA reserves the right to:

- Conduct investigations regarding respondent qualifications and experience
- Contact references and current or former clients
- Verify information submitted within proposals
- Request supplemental information
- Make procurement decisions based upon the overall best interests of CHA

CHA may consider qualitative factors including:

- Organizational fit
- Responsiveness
- Communication approach
- Employee advocacy capabilities
- Staffing continuity

- Overall compatibility

during the evaluation and selection process.

Nothing contained within this RFP shall create any contractual rights or obligations between CHA and any respondent unless and until a formal written agreement has been fully executed by all authorized parties.



Housing Authority of the City of Columbia, Missouri

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Department Source: CEO

To: CHA Board of Commissioners

From: CEO & Staff

CHA Board of Commissioners Meeting Date: May 20, 2026

Re: Current Events

Executive Summary

This memo provides a summary of both recent and future current events.

Discussion

- 4/3: Chamber QMB, Housing Panel. Randy
- 4/3: Mayoral Proclamation for 70 Year Anniversary, Noon. All CHA
- 4/8: CDBG and HOME Letters of Intent Due. Randy, Mary Ann, Justin
- 4/9: NAHRO Washington Housing Updates.
- 4/15: City/CHA Fair Housing Event. Rigel
- 4/15: CHA Board of Commissioners Meeting.
- 4/17: City Manager's Office Housing Continuum Survey. Randy, Kendra, Laura
- 4/20: CHA 70 Year Anniversary City Council Agenda Item. Randy
- 4/23: FSS Finance Class at Kinney Point. Caitlin and FSS Team
- 4/24: United Way Board Orientation. Randy
- 4/29: CHA Admin Day. All Staff
- 4/30: Chamber Local Government Day. Randy
- 5/1: CDBG and HOME Application Due.
- 5/6: CHA Boone County ARPA Check-in
- 5/6-5/8: LIHTC Training. Mary Ann
- 5/7: City Manager Meeting-Randy
- 5/11: Welcome Inn Resource Fair-Charline and Jamica
- 5/13: HCDC Meeting. CDBG and HOME Annual Application-City Proposals-Randy
- 5/14: WGL Foundation Meeting
- 5/18: Providence Walkway Construction Meeting. Justin, Mary Ann, David, Randy
- 5/19-5/21: Patriot Place Furniture Replacement VUF/CHA
- 5/21: CHA Staff SWOT Analysis
- 6/2-6/5: Randy Out of Office.
- 6/18-6/19: Missouri Workforce Housing Association Annual Conference. Mary Ann, Randy
- 6/30: County ARPA Expenditure Deadline. Mary Ann, Justin, Randy, David

Recommended Commission Action

Review and consider the report.