

## TRANSMITTAL

To: **THE COUNCIL**

Date: **06/16/21**

From: **THE MAYOR**

**TRANSMITTED FOR YOUR CONSIDERATION. PLEASE SEE ATTACHED.**



(Ana Guerrero) for

**ERIC GARCETTI**  
Mayor



Housing Development Bureau  
1200 West 7th Street, Los Angeles, CA 90017  
tel 213.808.8638 | fax 213.808.8610  
hcidla.lacity.org



Eric Garcetti, Mayor  
Ann Sewill, General Manager

June 14, 2021

Council File: NEW  
Council Districts: Citywide  
Contact Persons: Brittany Batong (213) 922-9627

Honorable Eric Garcetti  
Mayor, City of Los Angeles  
Room 303, City Hall  
200 N. Spring Street  
Los Angeles, CA 90012

Attention: Heleen Ramirez, Legislative Coordinator

**COUNCIL TRANSMITTAL: LOS ANGELES HOUSING + COMMUNITY INVESTMENT DEPARTMENT REQUEST FOR AUTHORITY TO RELEASE A REQUEST FOR PROPOSALS FOR A NEW AFFORDABLE HOUSING INFORMATION SYSTEM**

**SUMMARY**

The General Manager of the Los Angeles Housing + Community Investment Department (HCIDLA) respectfully requests that your office review and approve this transmittal and forward it to the City Council for further consideration. Through this transmittal, HCIDLA seeks approval, and requests authority to release a request for proposals (RFP) for a new affordable housing information system that will eventually replace the current outdated system that the department has been using since 2008.

The RFP was prepared in consideration of information that was shared by the HCIDLA work units that utilize the current system, during in-depth meetings where current workflows and procedures were discussed. A Core Project Team composed of staff from multiple bureaus of HCIDLA and a contracted systems expert reviewed these current processes to prepare an RFP for the selection of a new system that not only provides updated solutions for processes that are currently automated; but that also reduces dependence on manual and disjointed procedures. The selected vendor and the Core Project Team will work with HCIDLA staff to synthesize the currently employed workflows and procedures into a systems map that will allow customization of the selected solution. The goal is a fully integrated approach to project development, program management, data collection, and departmental reporting.

**RECOMMENDATIONS**

- I. That the Mayor review this transmittal and forward to the City Council for further action;
- II. That the City Council, subject to the approval of the Mayor;

- A. AUTHORIZE the General Manager of HCIDLA, or designee, to release a Request for Proposals (Attachment A) for a new Affordable Housing Information System, subject to the review and approval of the Office of the City Attorney as to form, assess the qualifications submitted, and return to the Mayor and City Council with contractor recommendations, funding levels and Controller's instructions.

## **BACKGROUND**

Annually, HCIDLA finances approximately 1,500 units of affordable housing through its various funding sources. As the successor agency to the Los Angeles Community Redevelopment Agency (CRA/LA), HCIDLA manages a current built portfolio (units in service) consisting of over 45,000 units of affordable housing across over 4,800 loans valued at \$2 billion (including 1,500 single-family homeownership loans), with approximately 1,400 new units becoming ready for occupancy annually.

HCIDLA's current Housing Information Management System (HIMS), the department's primary system to manage its affordable housing programs and housing asset portfolio, was developed as a web-based system in 2008. Major processes managed in HIMS include project development (application intake, project information tracking), loan tracking, and loan accounting. However, there are a number of processes that are managed fully or partially outside of HIMS, including disposition of City-owned properties, tax-exempt bond issuance, occupancy monitoring, construction oversight, homeownership loan inspections, preservation activities to address expiring covenants, accessible housing needs, and environmental reviews.

Currently, all project data are entered or imported into HIMS for loan processing and reporting on a regular or as-needed basis; however, not all data is in real-time. Business Units rely on many peripheral processes outside of HIMS. External data is imported into HIMS on a monthly or weekly basis, and is often out of date once reports are requested. There are processing gaps between HIMS functionality and actual business processes – and the system does not support all housing programs.

Outside of the above challenges, the user interface is difficult to use; there is no analytical capability to query reports on the development pipeline or loan portfolio (reports have to be requested through Systems staff); it does not have capacity or interface with other systems; and HIMS lacks the automation of basic functions, requiring more staff time to complete tasks.

The affordable housing project finance/development and asset management functions of the current system need to be replaced to provide an effective means for the Department to manage its housing development process for all federal, state, and local loan, grant, and tax credit funding resources and regulated units. The capacity of in-house systems staff to develop such a system is limited by the cost of keeping a new system up-to-date. In addition, in sourcing an outside entity to develop and maintain a systems solution, HCIDLA would be able to leverage industry best practices in business processes to asset management, project development, and accounting functions; and leverage more current technologies provided in these systems – such as advanced analytics, mobile inspection, data sharing, workflow, and GIS.

The new system will allow the City to better manage staff performance and improve efficiency with day-to-day activities, generate the information needed for planning and financial forecasting, ease the reporting burden and track and monitor the existing housing stock.

The new system must address information management for the various aspects of housing development and housing-related services, including but not limited to: property disposition, finance and loan information for approved projects, construction and project compliance management, land use and covenant information, asset and loan portfolio residual receipt data, occupancy requirements and tenant data, intuitive reporting mechanisms, and searchable document archives. In addition to the above functions, the new system must also support housing services programs and other operations, departmental admin functions, accessibility and other compliance needs, as well as other future housing department programs.

### Business Unit Needs Assessment

From March through May, 2021, the HCIDLA Systems contractor and a Core Project Team of HCIDLA staff met with each Housing Development Bureau (HDB) business unit, in addition to other HCIDLA units that will use the system in the future, to assess the detailed business requirements of each potential end-user. The research conducted has fed into the content outlined in the draft RFP, and will define how each functional area in HCIDLA relates to one another and the department's broader goals. Ultimately, these relationships will be depicted via a systems map that will be generated by the Systems contractor, HCIDLA staff, and the selected vendor. The business requirements will determine what type of software could best meet the needs of the HDB; and the systems map will take those requirements and integrate them into the selected solution. The ultimate goal will be to seamlessly transition program workflows into a new system.

### Request for Proposals

HCIDLA is requesting authority to issue an RFP to seek proposals from qualified organizations/contractors and ultimately select a vendor to provide an off-the-shelf or custom web-based software solution with mobile capabilities to support HCIDLA's affordable housing development programs, which also has the capability to expand to serve as a comprehensive departmental database for HCIDLA's non-housing development needs. The software solution for a new system that provides end-to-end management of the housing development lifecycle, including but not limited to, automating the migration of application data from an existing system into loan origination modules, providing real time information on utilization of federal, state and local funds and asset management. Features will include loan origination and underwriting (including due diligence and closing legal/loan documents), construction management, ongoing asset management, loan servicing, covenant compliance monitoring upon lease-up, and reporting/analytical features. The selected system should also have the capacity to expand to meet the department's other contracting, procurement, budgeting, and compliance needs, so that the City has the option of expanding its agreement with the vendor to add funding and develop future modules for the system with the larger departmental needs in mind. The RFP requested in this transmittal will replace the current system with one that provides an end-to-end integrated approach to affordable housing production and fund management of federal, state, local sources, grant, and tax credit resources; builds the department's data infrastructure; and creates connectivity to existing HCIDLA databases and create a mechanism for future systems-based expansion. The new system must have the analytic capacity to produce an array of customized reports that can visualize data, track project status, and articulate pipeline status. The system must have the flexibility to interface with other software systems and data sources and should inspire communication and collaboration by easily generating dashboards, using tickers such as alerts to improve efficiency, reducing manual processes, streamlining workflow processes, and integrating various functions within the department.

The new system will be referred to in this transmittal as the “Affordable Housing Information System (AHIS)”. However, a new name will be determined once a vendor has been selected.

### Eligible Proposers

Proposers must be in good standing with relevant regulatory oversight agencies and must possess the requisite licensing, and/or accreditation associated with the respective service for which a proposal is submitted. Only firms having direct and/or related experience in the delivery of similar services for which they are submitting a proposal will be considered.

### Evaluation Criteria

Each proposal will be evaluated on its own merits for content, responsiveness, conciseness, clarity, relevance, and strict adherence to the instructions in the RFP. Each proposal will be reviewed and rated on the following categories:

<b>TABLE 1: EVALUATION CRITERIA</b>		
<b>Item</b>	<b>Evaluation Criteria</b>	<b>Points</b>
1	<u>QUALIFICATIONS OF PROPOSER</u> Qualifications of project team and experience in successful delivery of similar solutions	15
2	<u>QUALITY OF PROPOSED BUSINESS SOLUTION</u> Meets functional, technical, implementation, and service support requirements	20
3	<u>FEATURES OF PROPOSED SOLUTION</u> Provides desired programmatic features; will culminate with a demonstration of the proposed solution	55
4	<u>COSTS</u> Overall costs of solution	10
	<b>TOTAL POINTS</b>	<b>100</b>

HCIDLA will establish an evaluation panel, which may include representatives from other public agencies, to review submitted proposals and make final recommendations. Proposers will have an opportunity to appeal procedural issues only, by submitting a letter to HCIDLA within five business days of being informed of the evaluation results. Vendor recommendations will be presented to the Mayor and City Council, who will exercise final authority in the selection of vendors and, if necessary, the allocation of funds. A fixed rate will be negotiated with the approved vendor(s).

### Charter Section 1022

On January 12, 2021, pursuant to the provisions of Charter Section 1022, HCIDLA requested a determination from the Personnel Department, whether or not the City currently has staff available to perform the required services sought under this RFP. While the Personnel Department found that City employees could perform the proposed scope of work, the Office of the City Administrative Officer (CAO) determined that it would be more feasible to contract out the services.

### FISCAL IMPACT

There is no impact to the General Fund. The proposed funding sources for these services will be from a combination of a state LEAP grant and local Linkage Fee Funds.

Approved By:

A handwritten signature in black ink, appearing to read "Ann Sewill". The signature is written in a cursive style with a horizontal line underneath.

ANN SEWILL  
General Manager  
Housing+Community Investment Department

ATTACHMENT:

Attachment A - AHIS RFP FINAL



**City of Los Angeles  
Housing and Community  
Investment Department**



Eric Garcetti, Mayor  
Ann Sewill, General Manager

## Request for Proposals (RFP)

### AFFORDABLE HOUSING INFORMATION SYSTEM

<b>Release Date</b>	<b>Monday, July 19, 2021</b>
<b>RFP Submission Deadline</b>	<b>Monday, August 30, 2021</b> Proposals shall be accepted no later than <b>5:00 p.m. PDT</b> via electronic submission only.
<b>Submission Address</b>	Email to: <a href="mailto:hcidla.contractsprocurement@lacity.org">hcidla.contractsprocurement@lacity.org</a>
<b>Mandatory Proposers' Conference</b> (Proposers must participate via webinar <u>only</u> , see page 9)	<b>Thursday, July 29, 2021</b> (2:00 p.m. – 4:00 p.m.) Please register by <b>Wednesday, July 28, 2021</b> at:
<b>Request for Technical Assistance Deadline</b>	<b>Monday, August 16, 2021</b> Submit by email only to: <a href="mailto:hcidla.contractsprocurement@lacity.org">hcidla.contractsprocurement@lacity.org</a>  All questions and answers will be made available to all proposers on the LABAVN website at: <a href="http://www.labavn.org">www.labavn.org</a>

*It is the policy of the City of Los Angeles to provide access to its programs and services for persons with disabilities in accordance with Title II of the Americans with Disabilities Act (ADA) of 1990, as amended. As a covered entity under Title II of the Americans with Disabilities Act, the City of Los Angeles does not discriminate on the basis of disability and, upon request, will provide reasonable accommodation to ensure equal access to its programs, services and activities.*

For more information on the City's business outreach opportunities, visit [www.labavn.org](http://www.labavn.org)

**City of Los Angeles  
Housing and Community Investment Department  
Request for Proposals  
Affordable Housing Information System**

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LWO Statutory Exemptions

**ATTACHMENT 4**

Proposer Workforce Information/Non-Collusion Affidavit

**ATTACHMENT 5**

Business Services Implementation Plan Collaborator Agreements

**ATTACHMENT 6** – *(Not applicable, nothing to submit)*

**ATTACHMENT 7**

Iran Contracting Act of 2010 Compliance Affidavit

**ATTACHMENT 8**

Corporate Documents

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CEC Form 55 Instructions

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## **I. BACKGROUND**

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### **A. ADMINISTRATIVE ENTITY**

The mission of the Los Angeles Housing + Community Investment Department (HCIDLA or the Department) is to promote livable and prosperous communities through the development and preservation of decent, safe, and affordable housing, neighborhood investment, and social services in the City of Los Angeles.

HCIDLA will serve as the administrative entity for this request for proposals (RFP) on behalf of the City of Los Angeles (City). HCIDLA has been authorized to release this RFP pursuant to action(s) approved by the Los Angeles City Council and Mayor (City Council File No. 20-XXXX).

### **B. OVERVIEW**

HCIDLA is a department made up of 4 bureaus containing 13 divisions and multiple units within those divisions. The Department uses federal, state, and local funding to build and preserve housing by leveraging funds (capital subsidy, tax-exempt finance bonds, etc.) with private investments in order to meet the City's housing needs. The Department also administers a variety of programs and services available to low and very-low income residents and first-time home buyers, such as lead abatement and programs that support seniors.

Annually, HCIDLA finances approximately 1,500 units of affordable housing through its various funding sources, which include determination of tax credit allocation, allocation of federal HOME Investment Partnerships Program (HOME), Community Development Block Grant (CDBG), Housing Opportunities for Persons with AIDS (HOPWA) funds, administration of tax-exempt conduit revenue bonds, implementation of Permanent Local Housing Allocation (a.k.a. SB2), implementation of Affordable Housing and Sustainable Communities (AHSC) program, and allocation of local Proposition HHH funding for supportive housing and Affordable Housing Linkage Fee funds. As the successor agency to the Los Angeles Community Redevelopment Agency, HCIDLA manages a current built portfolio (units in service) consisting of over 45,000 units of affordable housing across over 4,800 loans valued at \$2 billion (including 1,500 single-family homeownership loans), with approximately 1,400 new units becoming ready for occupancy annually. HCIDLA oversees management of its loans internally, while occupancy monitoring related to tenant income is contracted out. HCIDLA's Housing Inspection Group (HIG) conducts code inspections of properties.

HCIDLA seeks vendor(s) to provide an off-the-shelf or custom web-based software solution with mobile capabilities to support HCIDLA's affordable housing development programs, which also has the capability to expand to serve as a comprehensive departmental database for HCIDLA's non-housing development needs. The solution should support the full life cycle of housing development, including application intake, loan origination and underwriting (including due diligence and closing legal/loan documents), tax credit allocation, construction management, the Accessible Housing Program (AcHP),

on-going asset management, loan servicing, covenant compliance monitoring upon lease-up, and reporting/analytical features. It should also have the capacity to expand to meet the Department's other contracting, procurement, budgeting, and compliance needs, so that the City has the option of expanding its agreement with the vendor to add funding and develop future modules for the system with the larger departmental needs in mind.

The goal of the new system is to provide an end-to-end integrated approach to affordable housing production and fund management of federal, state, and local sources, grant, and tax credit resources; to build the Department's data infrastructure; and to create connectivity to existing HCIDLA databases and create a mechanism for future systems-based expansion. The new system must have the analytic capacity to produce an array of customized reports that can visualize data, track project status, and articulate pipeline status. The system must have the flexibility to interface with other software systems and data sources and should inspire communication and collaboration by easily generating dashboards, using tickers such as alerts to improve efficiency, reducing manual processes, streamlining workflow processes, and integrating various functions within the Department.

The new system will be referred to in this RFP as the "Affordable Housing Information System (AHIS)."

## **II. RFP SPECIFICATIONS**

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### **A. SERVICES SOLICITED**

This RFP seeks proposals from qualified organizations/contractors to provide a software solution for a new system that provides end-to-end management of the housing development lifecycle including, but not limited to, automating the migration of application data from an existing system into loan origination modules; providing real time information on utilization of federal, state and local funds; and asset management. This will replace similar functions in HCIDLA's Housing Information Management System (HIMS) and be the Department's primary system to manage its affordable housing programs and housing asset portfolio; the system may also be expanded in future phases and with additional future funding to replace the non-housing development components of HIMS. The proposed software solution may be an off-the-shelf solution, hosted or on premise, or a custom solution.

The affordable housing project finance/development and asset management functions of the current system need to be replaced to provide an effective means for the Department to manage its housing development process for all federal, state, and local loan; grant; and tax credit funding resources and regulated units. In addition, the system may eventually be expanded to serve the non-housing development needs within the Department. The new system will allow the City to better manage staff performance and improve efficiency with day-to-day activities, generate the information needed for planning and financial forecasting; ease reporting burden; and track and monitor the existing housing stock.

The new system must address information management for the various aspects of housing development and housing-related services including, but not limited to: property disposition; finance and loan information for approved projects; construction and project compliance management; accessibility of multi-family units through the ACHP; land use and covenant information; asset and loan portfolio residual receipt data; occupancy requirements and tenant data; intuitive reporting mechanisms; and searchable document archives. In addition to the above functions, the new system must also support housing services programs and other operations, departmental administrative functions, accessibility and other compliance needs, as well as other future housing department programs.

Please see Diagram 1, below, for a visual representation of the current systems environment for the Housing Development components of the existing system.

Please see Diagram 2, below, for a visual representation of the conceptual systems environment that HCIDLA is seeking through this RFP.

Los Angeles Housing and Community Investment Department  
Affordable Housing Information System RFP

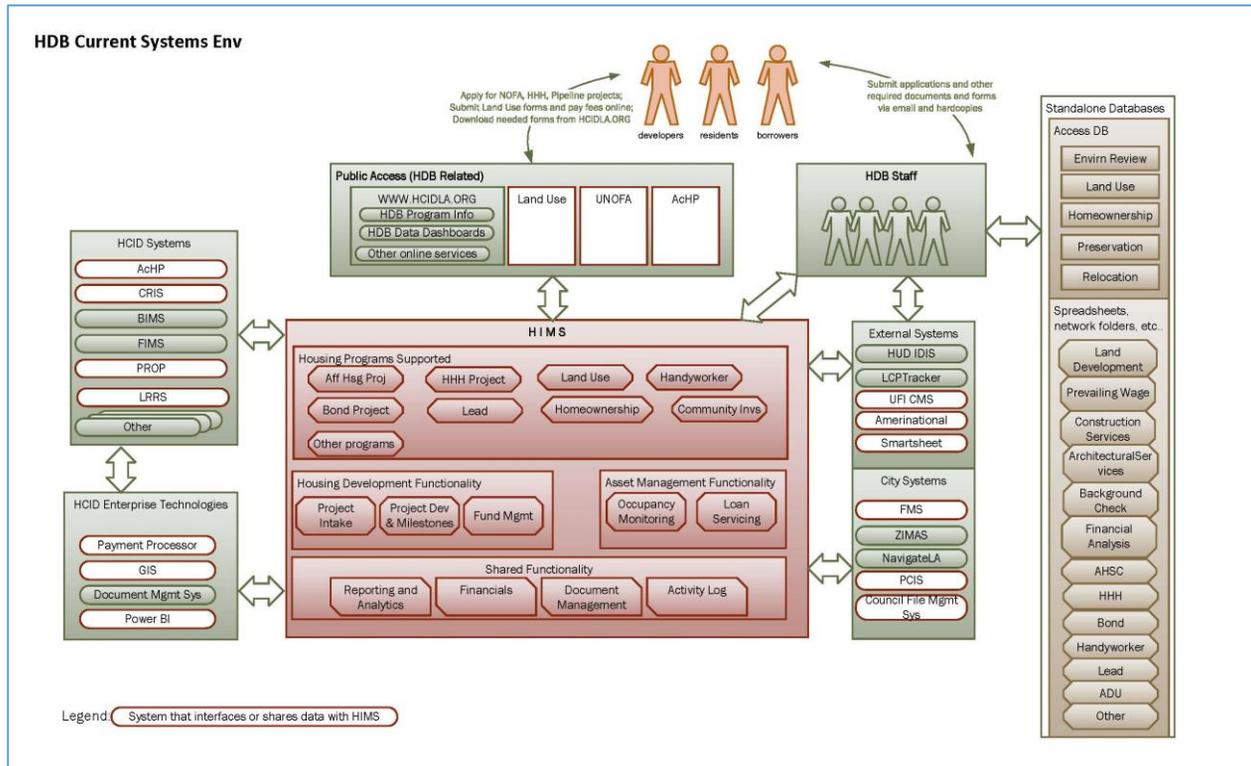


Diagram 1 – HCIDLA Housing Development Bureau Current Systems Environment

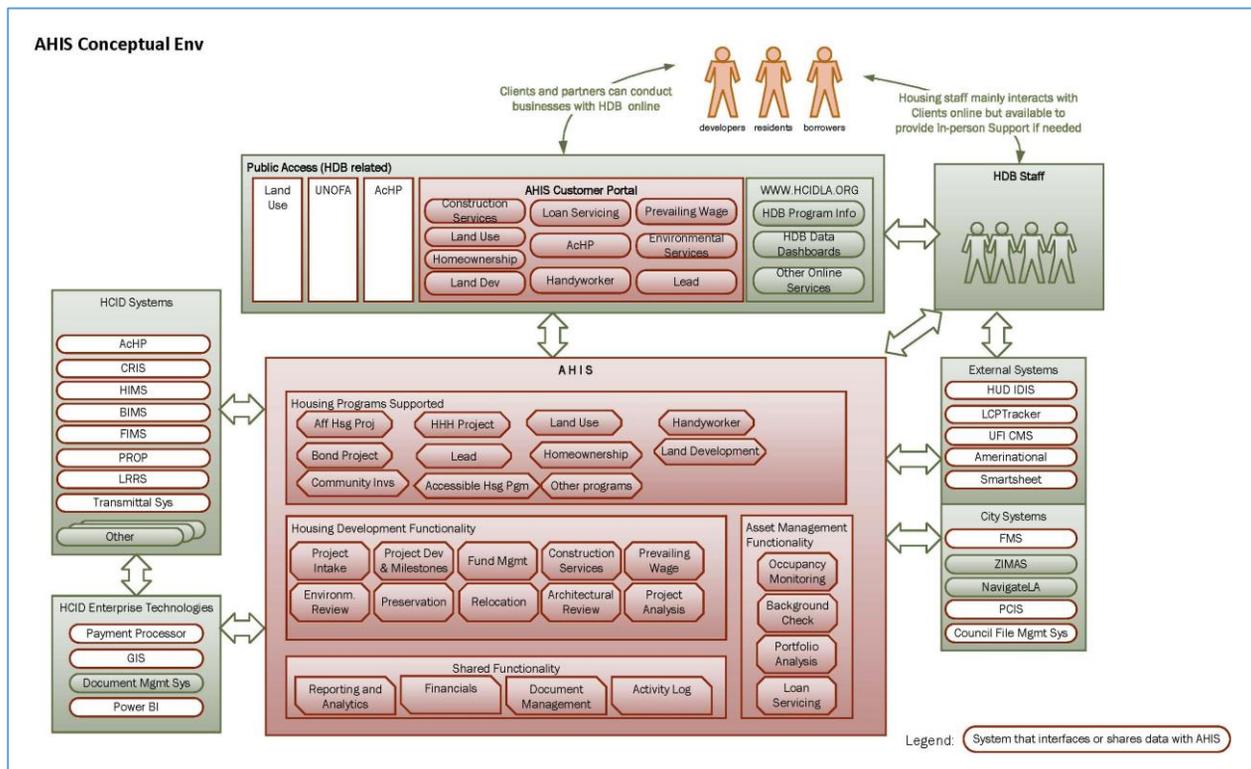


Diagram 2 – HCIDLA Housing Development Bureau Conceptual Systems Environment

## **B. SCOPE OF WORK**

The goal of this RFP is to solicit proposals that will provide the services necessary to successfully develop and implement a new Affordable Housing Information System.

The following scope of work should be reflected in the narrative responses provided as part of the Proposal Package; see section IV of this RFP, called "Proposal Package," under subsection B, "Narratives", for specific questions to which all proposers must respond.

### **1. Project Deliverables**

Project deliverables must include (but not be limited to) the following:

- a. Software
- b. Hosting services (if applicable)
- c. Project planning and management
- d. Configuration and development
- e. Data and document migration
- f. System interfaces and integration
- g. Testing and training, including a written procedural manual for the system
- h. Deployment and go-live support
- i. Warranty and on-going support

### **2. Project Goals**

The City seeks a web-based software system that supports the full life cycle of affordable housing development. Project goals include:

- a. The ability to support the City's process for allocating the State's 9% tax credit allocations within the City.
- b. The capacity to perform underwriting, loan origination, and loan servicing functions.
- c. Integration with the existing and new application systems.
- d. Communication with non-HCIDLA systems that allow for the performance of due diligence functions, such as developer background checks.
- e. Management of the construction process and prevailing wage compliance oversight.
- f. Administration of all federal, state, and local funding sources, including long-term compliance, and asset management for comprehensive program management.
- g. The capacity to expand the selected solution to address the Department's non-housing development systems' needs.

### **3. Expected Results**

The centralized housing management software system will allow stakeholders engaged in housing production to share information and adopt a streamlined "wrap around" approach for transparent delivery and an improved customer service experience. Expected results include:

- a. A streamlined, cohesive, integrated, and holistic approach to operations and the housing development process for improved operational efficiency.
- b. Streamlined program loan origination components.
- c. Improved tracking and monitoring of key information.
- d. Increased efficiency and automated functions, and decreased manual processes that allow for errors.
- e. Improved collaborative relationships between City staff, the housing development community, stakeholders, providers, loan-grantee recipients, and the public at large.
- f. Greater accountability and managerial oversight for each housing project.
- g. Deployment of ALL public resources for housing development in a coordinated and mutually reinforcing manner, to make the most strategic business intelligence choices that quantifies housing needs, identifies housing types (i.e. supportive housing, senior, transitional age youth etc.), and allocates funding sources toward the most vulnerable communities.
- h. Increased capacity to collect more program income to support more affordable housing development.
- i. Elimination of redundancies and duplication of related tasks/efforts across City agencies and HCIDLA internal divisions by creating features that ease the automated sharing of data and information.
- j. Increased efficiency that decreases costs (such as holding costs and loan processing time that adds to pre-development costs) and project development timelines.

#### 4. Desired Programmatic Features

Desired features include, but are not limited to:

- a. Web-based software to be used by the Department to manage housing development projects and perform loan servicing and asset management functions. Include a web portal where residents, borrowers, developers and property owners can submit applications for housing programs, submit development project documents, process construction draws, access loan servicing, and other self-help functionality.
- b. Analytic capacity to produce an array of customized reports that can visualize data, track project status, and articulate pipeline status; and which allows staff to select the data and date ranges displayed specific to their reporting needs.
- c. Capacity to interface with the Universal Notice of Funding Availability (NOFA) and other frequently used regional systems so that data from outside systems can populate new project records.
- d. Automated features that reduce manual processes and improve operational and reporting efficiency by connecting, integrating, and improving communication between functional units. This includes tools such as dashboards, shared document management, search features, automated routing and signatures, and project milestone notifications that allow for smooth transitions between finance, construction, and asset management teams.
- e. Capability to enter and monitor key performance indicators (i.e.: General Manager's Goals, Mayor's Office goals, etc.), including the time required to

- complete tasks, progress towards goals, milestone tracking, and internal and external reports.
- f. Data warehouse that provides 24/7, mobile/remote access on demand (in real time) for housing data, project status, source utilization and analysis of portfolio to stakeholders.
  - g. Provides a help desk support resources during Pacific Standard Time business hours 7:30 a.m. - 6:00 p.m., Monday-Friday. Provides instructional videos and periodic trainings for new learners.
  - h. Integration with Accessible Housing Program (AcHP) compliance systems.
  - i. Tax Credit Allocation functions, such as the ability to track the stage of a deal within the allocation cycle; ability to store specific building information; ability to pull data from an application process completed by an external client; ability to store values related to the review of the application for allocation of credits; ability to apply scoring to data to determine status in competitive round; and ability to store annual cycle specific information for the creation of Form 8610, the Annual Low-Income Housing Credit Agencies Report (housing credit agencies use this form to report the dollar amount of housing credits allocated during the calendar year, and transmit related forms to the IRS).
  - j. Preliminary background check functions for loan applicants, including functionality to communicate with Housing Authority of the City of Los Angeles (HACLA) data and project lists; Los Angeles Department of Building and Safety (LADBS) compliance; information on foreclosed properties that the applicant was involved in; development entity-owned real estate information; and each loan applicant's list of entities, loan agreements, and amendments.
  - k. Loan origination data, funding information, and loan and regulatory agreement documentation for Affordable Housing Managed Pipeline and Proposition HHH programs. This includes project loan disbursement features that allow for reporting of U.S. Housing and Urban Development (HUD)-pledged collateral, real time tracking of pledged loans, funding source allocations and real-time loan balances, any set-asides and loan term details, current project lists with status, and a portal for borrowers to access loan information in addition to submit loan documents.
  - l. Features to support conduit revenue bond issuance and administration on behalf of the Affordable Housing Bond Program and to-be-established Local Housing Finance Agency, including processing of fees and tracking mechanisms to support potential recycling of bonds.
  - m. Tracking and reporting the development of City-owned ground leased properties and sales effectuated from land disposition agreements, on behalf of HCIDLA's Land Development Unit, including any Los Angeles Department of Transportation (LADOT) data points.
  - n. Asset/Loan Portfolio Management, including the ability to identify discrepancies to accurately track residual receipts and other program income sources with tools that flag errors of all kinds for all users.
  - o. Processing and loan maturities features to expedite the administration of federal and state funding sources for acquisition, development, construction, and rehabilitation of affordable housing in the City.

- p. Capacity to process Land Use Covenants and determinations, including processing of fees; searchable covenant documentation and data; and tracking of properties at-risk of their covenants expiring.
- q. Construction management features that allow for mobile oversight and documentation during construction and prevailing wage site inspections; integration of permitting information from Los Angeles Department of Building & Safety; storage of architectural drawings, cost estimates, and approval information; as well as integrated features to support draw processing, monitoring of prevailing wage determinations and certified payrolls, and processing of federal- and state-specific documents and reports.
- r. Occupancy Monitoring and tenant data maintenance.
- s. Tracking and maintenance of loans issued by HCIDLA's Homeownership unit, including single-family loan maturity.
- t. Capacity to support housing service programs, such as lead remediation and minor rehab programs for seniors, such as the Handyworker Program.
- u. Specialized features for state and federal approvals, such as Article 34 authority issuance required under the California Constitution and reporting Community Housing Development Organization (CHDO) status.
- v. Support future housing program innovation such as new homelessness initiatives, the development of a Housing Finance Agency, and other new programs to meet the needs of the City of Los Angeles.
- w. Staff and task management, including comprehensive project and program management features.
- x. Live HCIDLA Executive Level Dashboard with option to identify preferred timeframe, metrics of focus, and formatted printing option. This would ultimately support efficient and time-sensitive data needs of the Executive Management group.
- y. Capability and capacity for future customization and configuration to accommodate for other unit needs such as Preservation, Contracts, Procurement, Budget, LEAD, etc.

## 5. Functional and Business Requirements

The proposed solution shall support the following functions. Detailed requirements are listed in the Appendices of this RFP:

1. Affordable housing project life-cycle management (see "Desired Programmatic Features" noted above)
2. System with ability for expansion to serve as a comprehensive departmental database with limited exceptions – to this end, the selected vendor will be asked to conduct preliminary information gathering sessions on future development needs for non-housing development enhancements.
3. Financial accounting
  - a. Cash management
  - b. Accounts payable
  - c. Loans receivable

- d. Grant/fund management
  - e. Financial reporting
  - f. Financial calculator
4. Technical requirements
- a. ADA compliance
  - b. Interface with existing systems
  - c. Data security
  - d. Scalability, availability and performance
  - e. Backup and disaster recovery
  - f. Integration with departmental and City systems

5. Project Milestones

Below is the list of Project Milestones and projected timeline of completion. Note, the specific components developed during the specific phases of the contract may be updated:

TABLE 1: PROJECT MILESTONES		
MILESTONES	Fiscal Year	ESTIMATED COMPLETION DATE
<p><b><u>Phase 1 (first two years of the contract term for the selected provider)</u></b>  <b>Development of the system’s lending components for both multi-family and single-family programs, which will maintain project information from land disposition to occupancy.</b></p>	21-22	9/30/2023
<p><b>Development of modules that support the construction and compliance of multi-family affordable housing projects, and other non-loan components.</b></p>	22-23	
<p><b><u>Phase 2 (will be subject to additional funding awards)</u></b>  <b>Development of modules that support other HCIDLA functions, including housing services programs and other operations, departmental administrative functions, accessibility and other compliance needs, as well as other future housing department programs.</b></p>	23-24	9/30/2024

6. City Representatives

The project will involve the following City staff teams: Steering Committee, Core Project Team, and Project Stakeholders.

The **Steering Committee** is comprised of executive-level representatives of HCIDLA with a vested interest in the outcome of the project. The Steering Committee sets the overall course for the project and assists in mitigating strategic project risks and issues. They will provide critical input to review and approve engagement deliverables, ensure the objectives of the project are aligned with overall strategic goals, and are the escalation point for all project related decisions.

The **Core Project Team** is responsible for the general oversight of the project, and will act as the City staff contacts for the selected contractor. This includes planning, implementation, and coordination, as well as any other activities that are related to the project.

The **Project Stakeholders** represent the key HCIDLA divisions and business units that will utilize the Affordable Housing Information System. The Stakeholders will assign resources from their respective areas to assist in requirement gathering, User Acceptance Testing (UAT), and operational readiness. They will also communicate system operational issues or concerns to the Core Project Team, provide feedback to the Core Project Team on whether the success criteria of the Project have been met, and present Go/No Go recommendations to the Steering Committee for the Affordable Housing Information System Project production readiness.

### **C. ELIGIBLE PROPOSERS (Threshold Requirements)**

Proposals will be accepted only from individuals or organizations that meet the following criteria. Proposers must:

1. Be qualified to conduct business in the State of California as evidenced by the organization's business registration with the California Secretary of State;
2. Be in good standing with the California Secretary of State, if a corporation or limited liability company;
3. Have not been determined to be non-responsible or been debarred by the City pursuant to the Contractor Responsibility Ordinance;
4. Have not been debarred by the federal government, State of California or local government;
5. Have a minimum of five (5) years of direct and/or related experience in administering part or all of the services solicited.
6. Not have an outstanding debt which has not been repaid or for which a repayment agreement plan has not been implemented, if the proposer has previously contracted with the State of California or the City of Los Angeles. If it has contracted with the HCIDLA, it must not have any outstanding disallowed costs or other liability to the City.

### **D. BUDGET AND SOURCES OF FUNDS**

The source(s) of funds for this RFP may include, but may not necessarily be limited to, a state LEAP Grant, local Linkage Fee funds, and other yet-to-be identified local sources. The estimated HCIDLA budget for the first two years of the contract (inclusive of project development and implementation) is \$702,500.

## E. CONTRACT TERM

The initial contract shall commence on or about October 1, 2021 for a two-year period, with an option to renew for one additional year, subject to the availability of funds, contractor's continuing compliance with applicable Federal, State, and local government legislation, an evaluation of contractor's performance, and approval by the Mayor and City Council.

## F. PRELIMINARY SCHEDULE

<u>Event</u>	<u>Date</u>
Request for Proposals Released	Monday, July 19, 2021
Mandatory Proposers' Conference	Thursday, July 29, 2021
Proposal Submission Deadline	Monday, August 30, 2021

## G. MANDATORY PROPOSERS' CONFERENCE

A Proposers' Conference, via [Zoom](#) only, has been scheduled to answer questions about this RFP. See cover page for Conference date and time. Participation is mandatory for anyone interested in submitting a proposal in response to this RFP, and failure to participate will result in proposer ineligibility. Please plan to participate on time as credit may not be given if a proposer's representative joins the conference late. At this Conference, City staff will review the RFP document and respond to questions regarding requirements of the RFP. City staff will not provide assistance regarding a proposer's individual program design. It is recommended that you have a copy of the RFP available to you during the webinar for easy reference.

The registration and remote participation information is as follows:

1. Please register for the **Affordable Housing Information System RFP Mandatory Proposers' Conference** by **July 28, 2021** at: <https://hcidla.zoom.us/meeting/register/tZYvd--gpzltEtJRnLNkMij3KVYogoVvO370>
2. Upon registering, you will receive a confirmation email which provides instructions on how to join. **NOTE:** Please join using the link provided in your confirmation email to ensure participation credit, and do not share your link as it is unique to you and could negatively affect your participation credit.
3. After selecting your unique link, the Zoom program will launch. A passcode is required to join and is provided in your confirmation email. If you do not have, or are unable to download the Zoom program application, you may join via web browser.
4. When attending, please select one of the following audio options:

**TO USE YOUR COMPUTER'S AUDIO:**

- After joining a Zoom meeting, you will join with computer audio automatically.

**TO USE YOUR TELEPHONE AS AUDIO:**

- After joining a Zoom meeting, you will be prompted to join the audio automatically. If this prompt does not appear or you close out of it, click Join Audio in the meeting controls.
- Click the Phone Call tab.
- Follow the instructions for dialing in:
  - In the Country/Region drop-down menu, select the country or region you're calling from.
  - Call one of the numbers provided.
  - Enter your meeting ID followed by #.
  - Enter your participant ID followed by #.
  - Enter the passcode, if prompted, followed by #.

5. Interested parties without computer access may participate during the scheduled event via telephone only. Instructions for participating via telephone only are as follows:

- On your phone, dial one of the teleconferencing numbers provided below:
  - +1 669 900 6833 (San Jose)
  - +1 408 638 0968 (San Jose)
  - +1 346 248 7799 (Houston)
  - +1 253 215 8782 (Tacoma)
  - +1 646 876 9923 (New York)
  - +1 301 715 8592 (Washington DC)
  - +1 312 626 6799 (Chicago)
- Enter the meeting ID number when prompted using your dial pad.
  - Meeting ID number: 822 0689 9786

**NOTE:** All participants who join via telephone only will need to provide their contact information to HCIDLA staff at the end of the conference in order to receive participation credit. Instructions will be provided during the conference.

For system compatibility information and user guides, please visit the Zoom Help Center at the following address: <https://support.zoom.us/hc/en-us>.

The City of Los Angeles does not discriminate on the basis of disability and, upon request, will provide reasonable accommodation to ensure equal access to its programs, services, and activities. Please contact the Contracts and Procurement Unit at (213) 744-7278

seventy-two (72) hours prior to the date of the conference to ensure proper accommodations.

## H. TECHNICAL ASSISTANCE

With the exception of the Mandatory Proposers' Conference, all technical assistance questions must be submitted by e-mail to [hcidla.contractsprocurement@lacity.org](mailto:hcidla.contractsprocurement@lacity.org). **Please identify the RFP title on the email subject line to ensure prompt attention from the appropriate City staff.** To ensure a fair and consistent distribution of information, all questions will be answered by a Question-and-Answer (Q&A) document available on the Los Angeles Business Assistance Virtual Network (LABAVN) website at: [www.labavn.org](http://www.labavn.org). No individual answers will be given. The Q&A document will be updated on a regular basis to ensure the prompt delivery of information.

## I. DEADLINE FOR SUBMISSION OF PROPOSALS

Proposals must be submitted electronically to the email address listed on the front cover of this RFP by 5:00 p.m. PDT by the submission deadline date. The cover letter accompanying the proposal must bear the actual signature of the person(s) authorized to sign the proposal and addressed to:

Contracts and Procurement Unit  
Los Angeles Housing and Community Investment Department  
1200 W. 7<sup>th</sup> Street, 4th Floor  
Los Angeles, CA 90017

Persons who submit a proposal will receive an email response confirming receipt of their submission. Proposers are encouraged to submit proposals well in advance of the proposal due date and time to ensure that proposals receive a time and date stamp of 5:00 p.m. or earlier.

Timely submission of proposals is the sole responsibility of the proposer. The City reserves the right to determine the timeliness of all submissions. Late proposals will not be reviewed. **ALL PROPOSALS SUBMITTED AFTER 5:00 P.M. PDT ON THE SUBMISSION DEADLINE DATE WILL NOT BE OPENED.**

## J. EVALUATION CRITERIA

The Housing and Community Investment Department will review and score each complete and fully responsive proposal. Proposals shall be determined eligible for review and scoring based on the responsiveness and factuality or verifiability of the proposal documentation and information. A minimum score of **70** is required to be considered for funding. The evaluation will be based on the proximity of a proposal's prices to competitive market values and relative to other proposers' pricing, the quality of responses to the RFP, and reasonableness of the proposer's costs relative to other proposers' costs. Proposals shall be evaluated based on the following categories and may include consideration of any or all of the listed factors at the City's sole discretion.

<b>TABLE 2: EVALUATION CRITERIA</b>	<b>MAXIMUM POINTS</b>
<u>QUALIFICATIONS OF PROPOSER</u> Qualifications of project team and experience in successful delivery of similar solutions	15
<u>QUALITY OF PROPOSED BUSINESS SOLUTION</u> Meets functional, technical, implementation, and service support requirements	20
<u>FEATURES OF PROPOSED SOLUTION</u> Provides desired programmatic features; will culminate with a demonstration of the proposed solution	55
<u>COSTS</u> Overall costs of solution	10
<b>TOTAL POINTS</b>	<b>100</b>

The City reserves the right to require a pre-award interview, site inspection and/or telephone conference call with proposers. HCIDLA reserves the right to select more than one contractor.

The City’s decision to award a contract(s) will be based on the stated evaluation criteria. The City reserves the right to modify the City’s objectives and requirements at any point during the period prior to submittal deadlines (by RFP addendum), without liability, obligation, or commitment to any party, firm or organization for costs incurred in responding to this RFP, RFP addendums or subsequent modifications of the City’s terms and conditions prior to execution of a contract.

Proposals will be evaluated against others proposing to provide the same services and to independent cost estimates. The lowest cost proposer may not be determined to be the best proposer when all the evaluation factors have been considered.

## **K. PROPOSAL REVIEW PROCESS**

The proposal review process shall include the following major activities to ensure that the procurement meets audit standards:

1. All proposals shall be reviewed to determine that the minimum eligibility requirements are met (See Section II. C). Ineligible proposers will be informed in writing.
2. All eligible proposals shall be reviewed, scored, and ranked.

- a. Evaluation criteria: Qualifications of Proposer

Each eligible proposal will be evaluated based on experience and depth of successfully delivering solutions of a similar nature, size and complexity.

- b. Evaluation criteria: Quality of Proposed Business Solution

All responsive documents will be evaluated to determine if the proposed business solution and approach best meet the functional, technical, implementation, and service support requirements.

c. Evaluation criteria: Features of Proposed Solution

Each eligible proposal will be evaluated to determine if the proposed solution will address the desired programmatic features. The proposers must provide the RFP evaluation team with access to a “demo” system to gain hands-on experience with the proposed solution.

Although this part of the evaluation criteria will be based on the narrative, proposers will also be asked to provide a demonstration of the proposed solution as part of the selection process. The purposes of the demonstration will be to present to the RFP evaluation team how the proposed solution will meet the project requirements; and to evaluate the proposer’s understanding of the project requirements and project objectives.

3. Each eligible proposal shall be reviewed for costs that are reasonable, allowable, necessary, and competitive, as measured by the overall total cost of the proposed solution, and its competitive standing as compared to all other proposals.
4. At the City’s sole discretion, oral interviews may be held with top-scoring proposers. The results of the oral review may determine the final funding recommendations.
5. Proposers shall be notified in writing about funding recommendations and evaluation results.

**L. PROPOSAL APPEAL PROCESS**

1. Appeal Rights

The City will notify all proposers of the results of the proposal evaluations and of their right to file an appeal. Proposers may appeal procedural issues only.

2. Letters of Appeal

Appeals shall be delivered electronically via email to HCIDLA at [hcidla.contractsprocurement@lacity.org](mailto:hcidla.contractsprocurement@lacity.org), no later than within five (5) business days from the date that the notification of the results of the RFP was emailed. Proposers may file an appeal by submitting a written request and identifying the specific reason for the appeal to:

Rosa Benavides, Chief Management Analyst  
Los Angeles Housing and Community Investment Department  
c/o Contracts and Procurement Unit  
RFP Appeal – Affordable Housing Information System  
1200 W. 7<sup>th</sup> Street, 4th Floor  
Los Angeles, CA 90017

Written appeals may not be more than three (3) typewritten pages and shall request an appeals review be granted. Written appeals must include the following

information:

- a. The name, address and telephone number of the proposer.
- b. The name/title of RFP to which the organization responded.
- c. Detailed statement of the grounds for appeal.

Written appeals may not include any new or additional information that was not submitted with the original proposal. Only one appeal per proposal will be permitted. All appeals and protests must be submitted within the time limits set forth in the above paragraphs.

3. Review Panel

A panel composed of selected staff will review the appeal for this RFP. The decision of the panel will be HCIDLA's final recommendation.

**M. DISCLAIMER**

The City is not responsible for representations made by any of its officers or employees prior to the approval of an agreement by the Los Angeles City Council unless such understanding or representation is included in this RFP or in subsequent written addenda. The City is responsible only for that which is expressly stated in this solicitation document and any authorized written addenda thereto.

### **III. GENERAL RFP INFORMATION**

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#### **A. GENERAL PROPOSAL CONDITIONS**

1. Costs Incurred by Proposers

All costs of proposal preparation shall be borne by the proposer. The City shall not, in any event, be liable for any pre-contractual expenses incurred by proposers in the preparation and/or submission of the proposals. Proposals shall not include any such expenses as part of the proposed budget.

2. Best Offer

The proposal shall include the proposer's best terms and conditions. Submission of the proposal shall constitute a firm and fixed offer to the City that will remain open and valid for a minimum of ninety (90) days from the submission deadline.

3. Accuracy and Completeness

The proposal must set forth accurate and complete information as required in this RFP. Unclear, incomplete, and/or inaccurate documentation may not be considered. Falsification of any information may result in disqualification.

If the proposer knowingly and willfully submits false performance or other data, the City reserves the right to reject that proposal. If it is determined that a contract was awarded as a result of false performance or other data submitted in response to this RFP, the City reserves the right to terminate the contract.

Unnecessarily elaborate or lengthy proposals or other presentations beyond those needed to give a sufficient, clear response to all the RFP requirements are not desired.

4. Withdrawal of Proposals

Proposals may be withdrawn by written request of the authorized signatory on the proposer's letterhead or by email at any time prior to the submission deadline.

5. General City Reservations

Submission Deadline - The City reserves the right to extend the submission deadline should this be in the interest of the City. Proposers have the right to revise their proposals in the event that the deadline is extended.

Withdrawal of RFP - The City reserves the right to withdraw this RFP at any time without prior notice. The City makes no representation that any contract will be awarded to any proposer responding to the RFP. The City reserves the right to reject any or all submissions.

Reissue of RFP - If an inadequate number of proposals is received or the proposals received are deemed non-responsive, not qualified or not cost effective, the City may at its sole discretion reissue the RFP or execute a sole-source contract with a vendor.

Changes to Proposals - The City shall review and rate submitted proposals. The proposer may not make any changes or additions after the deadline for receipt of proposals. The City reserves the right to request additional information or documentation, as it deems necessary.

Verification of Proposal Information - The City reserves the right to verify all information in the proposal. If the information cannot be verified, and if the errors are not willful, the City reserves the right to reduce the rating points awarded.

Pre-award Interview - The City reserves the right to require a pre-award interview and/or site inspection.

Minor Defects - The City reserves the right to waive minor defects in the proposal in accordance with the City Charter.

Program Personnel - If the selection of the proposer is based in part on the qualifications of specific key individuals named in the proposal, the City must approve in advance any changes in the key individuals or the percentage of time they spend on the project. The City reserves the right to have the contractor replace any project personnel.

Rejection of Proposals - The City reserves the right to reject any or all proposals, to waive any minor defects in proposals received; to reject unapproved alternate proposal(s); and reserve the right to reject the proposal of any proposer who has previously failed to perform competently in any prior business relationship with the City. The rejection of any or all proposals shall not render the City liable for costs or damages.

## 6. Contract Negotiations

Proposers approved for funding shall be required to negotiate a contract with the City on an offer/counter-offer basis. The best terms and conditions originally offered in the proposal shall bind the negotiations. The City reserves the right to make a contract award contingent upon the satisfactory completion by the proposer of certain special conditions. The contract offer of the City may contain additional terms or terms different from those set forth herein.

As part of the negotiation process, the City reserves the right to:

- a. Fund all or portions of a proposer's proposal and/or require that one proposer collaborate with another for the provision of specific services, either prior to execution of an agreement or at any point during the life of the agreement;
- b. Use other sources of funds to fund all or portions of a proposer's proposal;

- c. Require that a funded proposer utilize a facility designated by the City for purposes of implementing its project;
- d. Elect to contract directly with one or more of the identified collaborators; and
- e. Require all collaborators identified in the proposal to become co-signatories to any contract with the City.

7. Standing of Proposer

Regardless of the merits of the proposal submitted, a proposer may not be recommended for funding if it has a history of contract non-compliance with the City or any other funding source, poor past or current contract performance with the City or any other funding source, or current disputed or disallowed costs with the City or any other funding source.

Contractors/Organizations that have been sanctioned because of non-compliance with Single Audit Act requirements for managing grant funds will be eligible to apply; however, they will not be eligible to receive any funding, if awarded under this RFP process, until this sanction is removed.

The City will enter into an agreement only with entities that are in good standing with the California Secretary of State.

8. Proprietary Interests of the City

The City reserves the right to retain all submitted proposals, which shall then become the property of the City and a matter of public record. Any department or agency of the City has the right to use any or all ideas presented in the proposal without any change or limitation. Selection or rejection of a proposal does not affect these rights. All proposals will be considered public documents, subject to review and inspection by the public at the City's discretion, in accordance with the Public Records Act.

Proposers must identify all copyrighted material, trade secrets or other proprietary information claimed to be exempt from disclosure under the California Public Records Act (California Government Code Sections 6250 et seq.) In the event such an exemption is claimed, the proposal must state: "(Name of Proposer) shall indemnify the City and hold it and its officers, employees and agents harmless from any claim or liability and defend any action brought against the City for its refusal to disclose copyrighted material, trade secrets or other proprietary information to any person making a request therefor." Failure to include such a statement shall constitute a waiver of the proposer's right to exemption from disclosure.

In any event, all information contained in this RFP is considered confidential and not open to the public or competing bidders until allowed by the law.

9. Discount Terms

Proposers agree to offer the City any discount terms that are offered to its best customers for the goods and services to be provided herein, and apply such discount to payments made under this agreement, which meet the discount terms.

**B. STATEMENTS REQUIRED WITH PROPOSAL**

1. Contractor Responsibility Ordinance (CRO) Questionnaire

Every Request for Proposal, Request for Bid, Request for Qualifications or other procurement process is subject to the provisions of the Contractor Responsibility Ordinance, Section 10.40 et seq. of Article 14, Chapter 1 of Division 10 of the Los Angeles Administrative Code, unless exempt pursuant to the provisions of the Ordinance.

This Ordinance requires that all proposers/bidders complete and return, with their response, the responsibility questionnaire included in this procurement. Failure to return the completed questionnaire may result in the proposer/bidder being deemed non-responsive.

The Ordinance also requires that if a contract is awarded pursuant to this procurement, that the contractor must update responses to the questionnaire, within thirty calendar days, after any changes to the responses previously provided if such change would affect contractor's fitness and ability to continue performing the contract.

Pursuant to the Ordinance, by executing a contract with the City, the contractor pledges, under penalty of perjury, to comply with all applicable federal, state and local laws in performance of the contract, including but not limited to laws regarding health and safety, labor and employment, wage and hours, and licensing laws which affect employees. Further, the Ordinance, requires each contractor to: (1) notify the awarding authority within thirty calendar days after receiving notification that any governmental agency has initiated an investigation which may result in a finding that the contractor is not in compliance with Section 10.40.3 (a) of the Ordinance; and (2) notify the awarding authority within thirty (30) calendar days of all findings by a government agency or court of competent jurisdiction that the contractor has violated Section 10.40.3 (a) of the Ordinance.

All proposers shall submit a completed CRO Questionnaire and Pledge of Compliance signed under penalty of perjury with their proposal. Refer to links below:

<https://bca.lacity.org/Uploads/cro/CRO%20Personal%20Services%20Questionnaire%20FINAL%2001.23.2020.pdf>

and

[https://bca.lacity.org/Uploads/cro/CRO\\_Pledge%20of%20Compliance\\_Fillable%200%281%29.PDF](https://bca.lacity.org/Uploads/cro/CRO_Pledge%20of%20Compliance_Fillable%200%281%29.PDF)

If a proposer will have subcontractors in the project, a list of the subcontractors must also be submitted with the proposal.

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL.**

2. Municipal Lobbying Ordinance City Ethics Commission (CEC) Form 50

All proposers must submit a completed Bidder Certification CEC Form 50. Please review the following link for more information on the City's Municipal Lobbying Ordinance:

<https://ethics.lacity.org/wp-content/uploads/Laws-Lobbying-MLO.pdf>. (Refer to the link below to access the Bidder Certification CEC Form 50, <https://ethics.lacity.org/pdf/forms/City/CEC50.pdf>).

NOTE: Failure to submit this completed CEC Form 50 will result in the proposer being deemed non-responsive and the proposal will be rejected.

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL.**

3. Municipal Campaign Finance Ordinance CEC Form 55

Persons who submit a response to this solicitation (bidders) are subject to City of Los Angeles Charter Section 470(c)(12) and related ordinances. As a result, bidders may not make campaign contributions to and or engage in fundraising for certain elected City officials or candidates for elected City office from the time they submit the response until either the contract is approved or, for successful bidders, 12 months after the contract is signed. The bidder's principals and subcontractors performing \$100,000 or more in work on the contract, as well as the principals of those subcontractors, are also subject to the same limitations on campaign contributions and fundraising.

Bidders/proposers must submit CEC Form 55 to the awarding authority at the same time the response is submitted (refer to the following link to access the form <https://ethics.lacity.org/pdf/forms/City/CEC55.pdf>). The form requires bidders to identify their principals, their subcontractors performing \$100,000 or more in work on the contract, and the principals of those subcontractors. Bidders must also notify their principals and subcontractors in writing of the restrictions and include the notice in contracts with subcontractors. Responses submitted without a completed CEC Form 55 shall be deemed nonresponsive. Bidders who fail to comply with City law may be subject to penalties, termination of contract, and debarment. (See **Attachment 10** – Form 55 Instructions). Additional information regarding these restrictions and requirements may be obtained from the City Ethics Commission at (213) 978-1960 or [ethics.lacity.org](https://ethics.lacity.org).

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL.**

4. Equal Benefits Ordinance/First Source Hiring Ordinance Compliance Affidavits

All bidders/proposers are advised that any contract awarded pursuant to this procurement process shall be subject to the applicable provisions of Los Angeles Administrative Code Section 10.8.2.1, Equal Benefits Ordinance (EBO) and the Los Angeles Administrative Code Sections 10.44 et seq., First Source Hiring Ordinance (FSHO).

Effective July 1, 2016, the Equal Benefits Ordinance and First Source Hiring Ordinance Compliance affidavits were combined into one web application form available on the City of Los Angeles' Business Assistance Virtual Network (BAVN) residing at [www.labavn.org](http://www.labavn.org). All bidders/proposers shall complete and upload the joint affidavit prior to the award of a City contract, the value of which exceeds \$25,000. A sample form may be accessed via the link below:

[http://www.labavn.org/misc/docs/co\\_files/EBOFSHO/EBOFSHO\\_Sample\\_07-01-2016.pdf](http://www.labavn.org/misc/docs/co_files/EBOFSHO/EBOFSHO_Sample_07-01-2016.pdf)

If subject to the ordinances, a contractor will be required to complete the web application form, electronically sign, and submit. If a form was uploaded and verified prior to July 1, 2016, these will continue to be valid until they expire or are deleted (generally three years from upload date). When the form expires, a contractor will be required to complete the new web application form.

#### Equal Benefits Ordinance

By completing and uploading the Equal Benefits Ordinance Compliance Affidavit, your company is certifying compliance with the requirements of said ordinance. If selected as a successful Bidder/Proposer, your EBO Compliance Affidavit will be verified for completeness by the Office of Contract Compliance (OCC) prior to contract award. The EBO Affidavit shall be effective for a period of three years from the date it is first uploaded onto the City's BAVN. A company wishing to seek a waiver of the EBO provisions must submit the EBO Waiver Application with the bid or proposal. The EBO Waiver Application shall be forwarded to OCC for processing. OCC shall notify the awarding department of the determination resulting from the waiver request. Upon contract award, your company may be randomly selected for a compliance audit, at which time your company will be required to demonstrate compliance as indicated in the EBO Compliance Affidavit.

#### First Source Hiring Ordinance

Prime contractors who are awarded a contract that is subject to the requirements of the FSHO must complete and upload the FSHO Compliance Affidavit. Unless otherwise exempt, the FSHO applies to service contracts over \$25,000 and 3 months, and some loan or grant recipients. Awarding departments may seek exemption by submitting a completed FSHO-X Form to the Office of Contract Compliance prior to contract execution.

The uploaded forms will be verified by the Bureau of Contract Administration (BCA) only if your company is the successful proposer/bidder selected for contract award.

Upon BCA verification, the Awarding Authority shall award the contract. If in the process of verifying the uploaded forms, BCA finds that the form(s) are incomplete, the awarding department shall be notified and your company will be required to re-upload the form(s). The re-uploading of form(s) will not trigger a new renewal date. The renewal date shall remain as the first time the form(s) were uploaded.

Bidders/proposers shall complete and submit ONLINE, with their proposal, the EBO/FSHO Affidavit, or Request for Waiver, if applicable.

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL ONLINE.**  
([www.labavn.org](http://www.labavn.org))

5. Disclosure Ordinances Affidavit (Slavery Disclosure Ordinance, Disclosure of Border Wall Contracting Ordinance)

Unless otherwise exempt by the provisions of the Slavery Disclosure Ordinance (SDO) and Disclosure of Border Wall Contracting Ordinance (DBWCO), any contract awarded under this RFP will be subject to the SDO, Section 10.41 of the Los Angeles Administrative Code and the DBWCO, Section 10.50 of the Los Angeles Administrative Code.

You must register on LABAVN ([www.labavn.org](http://www.labavn.org)) to access the updated Disclosure Ordinances Affidavit web form. The web form can be found by clicking on the "Profiles" tab. Scroll to the "Company Profile" section and click on "Compliance Documents". The web form should be completed and submitted by the time of RFP submission.

The web form will be verified by the Bureau of Contract Administration (BCA) only if your company is the successful Proposer/Bidder selected for contract award. Proposers/Bidders seeking additional information regarding the requirements of the SDO and DBWCO Disclosure Ordinances may visit the Bureau of Contract Administration's website at <http://bca.lacity.org>.

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL ONLINE.**  
([www.labavn.org](http://www.labavn.org))

6. Living Wage Ordinance and Service Contractor Worker Retention Ordinance

Unless approved for an exemption, contractors under contracts primarily for the furnishing of services to or for the City and that involve an expenditure or receipt in excess of \$25,000 and a contract term of at least three (3) months, lessees and licensees of City property, and certain recipients of City financial assistance, shall comply with the provisions of Los Angeles Administrative Code Sections 10.37 et seq., Living Wage Ordinance (LWO) and 10.36 et seq., Service Contractor Worker Retention Ordinance (SCWRO). Bidders/Proposers shall refer to **Attachment 2**,

“Living Wage Ordinance and Service Contractor Worker Retention Ordinance” for further information regarding the requirements of the Ordinances.

Bidders/proposers who believe that they meet the qualifications for one of the exemptions described in the LWO List of Statutory Exemptions (see **Attachment 3: LWO Statutory Exemptions**) shall apply for an exemption from the Ordinance by submitting with their proposal the

LW-10 - Exemption Application which can be accessed at: <https://bca.lacity.org/Uploads/lwo/LW%2010%20-%20OCC%20Exemption%20Application%20edited%207.10.19.pdf> or by

submitting the LW-26 - Small Business Exemption Application which can be accessed at:

[https://bca.lacity.org/Uploads/lwo/LW26\\_Small\\_Business\\_Exemption\\_Application%28English%29.pdf](https://bca.lacity.org/Uploads/lwo/LW26_Small_Business_Exemption_Application%28English%29.pdf) or by submitting the LW-28 – 501(c)3 Nonprofit Exemption

Application, which can be accessed at:

[https://bca.lacity.org/Uploads/lwo/Template\\_LW%2028%20-%20501c3%20Nonprofit%20Exemption%20Application.pdf](https://bca.lacity.org/Uploads/lwo/Template_LW%2028%20-%20501c3%20Nonprofit%20Exemption%20Application.pdf) or by submitting the

LW-29 Non-Coverage Determination Application, which can be accessed at: [https://bca.lacity.org/Uploads/lwo/LW29\\_NonCoverage\\_Determination\\_Application.pdf](https://bca.lacity.org/Uploads/lwo/LW29_NonCoverage_Determination_Application.pdf)

**THESE STATEMENTS ARE REQUIRED WITH THE PROPOSAL, IF APPLICABLE.**

7. Proposer Workforce Information/Non-Collusion Affidavit

Proposers shall submit with their proposal a statement indicating their headquarters address, as well as the percentage of their workforce residing in the City of Los Angeles. Proposer shall also submit a completed Workforce Information/Non-Collusion Affidavit. (See **Attachment 4: Proposer Workforce Information/Non-Collusion Affidavit**).

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL.**

8. Business Services Implementation Plan Collaborator Agreements

Proposals shall include completed forms from each organization intending to formally collaborate with the proposers (see **Attachment 5: Collaborator Agreements**).

**THIS STATEMENT IS REQUIRED WITH THE PROPOSAL.**

9. Subcontractors

If a proposer will have subcontractors in the program, a list of the subcontractors must also be submitted with the proposal.

10. Iran Contracting Act of 2010

In accordance with California Public Contract Code Sections 2200-2208, all bidders/proposers submitting proposals for, entering into, or renewing contracts with the City of Los Angeles for goods and services estimated at \$1,000,000 or more are required to complete, sign and submit the "Iran Contracting Act of 2010 Compliance Affidavit" (see **Attachment 7**: for Affidavit form).

## C. CONTRACT EXECUTION REQUIREMENTS

**If recommended for funding**, the proposer shall be required to enter into an agreement with the City of Los Angeles and comply with the requirements listed below. **Failure to comply with these requirements will result in non-execution of the contract.** A copy of the City's Standard Agreement is available upon request. The agreement with the selected proposer(s) will be on a to-be-negotiated fee-for-performance basis.

### 1. Insurance Certificates

Contractors will be required to maintain insurance at a level to be determined by the City's Risk Manager, with the City named as an additional insured. Contractors who do not have the required insurance should include the cost of insurance in their bid. Contractors will be required to provide insurance at the time of contract execution (refer to **Attachment 13**: "Required Insurance and Minimum Limits" and the following link for Insurance Instructions and Information [http://cao.lacity.org/risk/Submitting\\_proof\\_of\\_Insurance.pdf](http://cao.lacity.org/risk/Submitting_proof_of_Insurance.pdf)).

### 2. Secretary of State Documentation

All contractors are required to submit one copy of their Articles of Incorporation, partnership, or other business organizational documents (as appropriate) filed with the Secretary of the State. Organizations must be in good standing and authorized to do business in California, as registered contractors with the State of California. Visit the Secretary of State's website for more information at: <https://businesssearch.sos.ca.gov/>.

### 3. Corporate Documents

All contractors who are organized as a corporation or a limited liability company are required to submit a Secretary of State Corporate Number, DUNS number, a copy of its By-Laws, a current list of its Board of Directors, and a Resolution of Executorial Authority with a Signature Specimen (see **Attachment 8**: Corporate Documents).

### 4. City Business License Number

All contractors are required to submit one copy of their City of Los Angeles Business License, Tax Registration Certificate or Vendor Registration Number. To obtain a Business Tax Registration Certificate (BTRC), call the Office of Finance

at (213) 473-5901 and pay the respective business taxes. The address is: Los Angeles City Office of Finance, Tax and Permit Division, City Hall, 200 N. Spring Street, Room 101, Los Angeles, CA 90012. Visit the Office of Finance's website for more information at: [www.finance.lacity.org](http://www.finance.lacity.org).

5. Proof of IRS Number (W-9)

All contractors are required to complete and submit Proof of IRS Number (W-9) form. (Refer to link: <http://www.irs.gov/pub/irs-pdf/fw9.pdf> Request for Taxpayer Identification Number (Form W-9).

6. Nonprofit Status Documentation from the Internal Revenue Service (IRS)

Proposers must submit a copy of their notice from the IRS designating the agency as a 501(c)(3) organization or other evidence of its tax exempt status from the IRS, if applicable.

7. Certifications

Contractors shall provide copies of the following documents to the City:

- a. A Certificate Regarding Ineligibility, Suspension and Debarment as required by Executive Order 12549.
- b. Certification and Disclosure Regarding Lobbying (not required for contracts under \$100,000). Contractors shall also file a Disclosure Form, at the end of each calendar quarter during which any event requiring disclosure, or which materially effects the accuracy of the information contained in any previously filed Disclosure Form, occurs
- c. A Certificate Regarding Drug-Free Workplace Requirements, if applicable.

8. Collaboration

The City may, at its discretion, require two or more proposers to collaborate as a condition to contract execution.

9. Non-Discrimination/Equal Employment Practices/Affirmative Action

Effective July 1, 2016 the Non-Discrimination/Equal Employment Practices and Affirmative Action (ND/EEP and AA) provisions were amended to eliminate the need for contractors to complete affidavits on BAVN. By affixing its signature to a contract, the contractor agrees to adhere to the ND/EEP and AA for the duration of the contract. When a contractor signs the contract, they will also be acknowledging their responsibility to comply with both the ND/EEP and AA provisions. The AA provisions will now apply to all construction contracts and all non-construction contracts of \$25,000 or more.

Bidders/proposers seeking additional information regarding the requirements of the City's Non-Discrimination Clause, Equal Employment Practices and Affirmative Action Program may visit the Bureau of Contract Administration's website at:

<https://bca.lacity.org/Uploads/eeo/NDEEOAAP%20Admin%20Code.pdf>

#### 10. Americans with Disabilities Act

Any contract awarded pursuant to this RFP shall:

- a. Comply with the Americans with Disabilities Act, as amended, 42 U.S.C. Section 12101 et seq., the Rehabilitation Act of 1973, as amended, 29 U.S.C. Section 701 et seq., the Fair Housing Act, and its implementing regulations and any subsequent amendments; and California Government Code Section 11135.
- b. Not discriminate in the provision of its programs, services or activities on the basis of disability or on the basis of a person's relationship to, or association with, a person who has a disability.
- c. Provide reasonable accommodation upon request to ensure equal access to all of its programs, services and activities.

Contractor represents that it will certify that any construction for housing performed with funds provided through any future contract will be done in accordance with the Uniform Federal Accessibility Standards (UFAS), 24 CFR, Part 40.

Contractor represents that it will certify that its buildings, and facilities used to provide services in accordance with any future contract, are in compliance with the federal and state standards for accessibility as set forth in the 2010 ADA Standards, California Title 24, Chapter 11, or other applicable federal and state law.

Contractor understands that the City is relying upon these certifications and representations as a condition of funding any future contract.

Contractor will require its subcontractors, if any, to include this language in any subcontract.

Contractors must be in compliance with these provisions at the time the contract is executed.

#### 11. Child Support Assignment Orders

Any contract awarded pursuant to this RFP shall be subject to the following:

This contract is subject to Section 10.10 of the Los Angeles Administrative Code, Child Support Assignment Orders Ordinance. Pursuant to this Ordinance, contractor/consultant certifies that it will (1) fully comply with all State and Federal employment reporting requirements applicable to Child Support Assignment Orders; (2) that the principal owner(s) of contractor/consultant are in compliance with any Wage and Earnings Assignment Orders and Notices of Assignment applicable to them personally; (3) fully comply with all lawfully served Wage and Earnings Assignment Orders and Notices of Assignment in accordance with California Family Code Section 5230 et seq.; and (4) maintain such compliance throughout the term of this Contract. Pursuant to Section 10.10.b of the Los Angeles Administrative Code, failure of contractor/consultant to comply with all applicable reporting requirements or to implement lawfully served Wage and Earnings Assignment Orders and Notices of Assignment or the failure of any principal owner(s) of contractor/consultant to comply with any Wage and Earnings Assignment Orders and Notices of Assignment applicable to them personally shall constitute a default by the contractor/consultant under the terms of this contract, subjecting this contract to termination where such failure shall continue for more than 90 days after notice of such failure to contractor/consultant by City. Any subcontract entered into by the contractor/consultant relating to this Contract, to the extent allowed hereunder, shall be subject to the provisions of this paragraph and shall incorporate the provisions of the Child Support Assignment Orders Ordinance. Failure of the contractor/consultant to obtain compliance of its subcontractors shall constitute a default by the contractor/consultant under the terms of this contract, subjecting this contract to termination where such failure shall continue for more than 90 days after notice of such failure to contractor/consultant by the City.

Contractor/Consultant shall comply with the Child Support Compliance Act of 1998 of the State of California Employment Development Department. Contractor/Consultant assures that to the best of its knowledge it is fully complying with the earnings assignment orders of all employees, and is providing the names of all new employees to the New Hire Registry maintained by the Employment Development Department as set forth in subdivision (1) of the Public Contract Code 7110 (see **Attachment 9**: Child Support Obligations).

## 12. Fair Chance Initiative for Hiring Ordinance

City Contractors and subcontractors with 10 or more employees are prohibited under Los Angeles Administrative Code Section 10.48 from seeking a job applicant's criminal history information until a job offer is made and from withdrawing a job offer unless the employer performs an assessment of the applicant's criminal history and the duties of the position. Contractors and subcontractors are required to include information regarding the ordinance in all job solicitations and advertisements and to post notices informing job applicants of their rights. Additional information and forms can be found at Department of Public Works, Bureau of Contract Administration at: <https://bca.lacity.org/fair-chance>

### 13. Nonresident/Foreign Tax Withholding

The City must generally impose California withholding tax of 7% on payments issued to nonresident vendors, unless otherwise exempted. In cases where a nonresident vendor is of a foreign status, such payments are generally subject to an additional 30% federal withholding tax, unless otherwise exempted or reduced by an applicable income tax treaty or other legal provision.

Nonresident vendors should submit the applicable Franchise Tax Board's (FTB) nonresident tax forms to clarify their tax withholding status. Examples of State nonresident tax forms are listed below. State income tax forms can be accessed through the FTB link: <https://www.ftb.ca.gov/forms/index.html>

California Nonresident Income Tax	Form Number	Form Description
	Form 590	Used to indicate that the vendor has submitted a Form 590 and is claiming an exemption from withholding
	Form 587	Used to indicate that the vendor submitted Form 587 and to allocate expected gross payments to amounts subject to withholding.
	Form 588	CA Non-Resident Withholding Waiver Request. Should be accompanied with FTB approval.
	Form 589 C	CA Non-Resident Reduced Withholding Request. Should be accompanied with FTB approval.

Foreign vendors should submit the applicable federal withholding tax forms in addition to the applicable Franchise Tax Board Form(s). Examples of certain federal withholding tax forms are listed below. Federal withholding tax forms can be found using the following link: <https://apps.irs.gov/app/picklist/list/formsInstructions.html>

Federal Nonresident Income Tax	Form Number	Form Description
	8233	Exemption From Withholding for Independent Personal Services (Individuals)
	W-8BEN	Certificate of Foreign Status for U.S Tax (Individuals)
	W-8BEN-E	Certificate of Status of Foreign Status for U.S. Tax (Entities)
	W-8ECI	Certificate of Foreign Person's Claim of Effectively Connected Income
	W-8EXP	Certificate of Foreign Government or Other Foreign Organization tax exemption
	W-8IMY	Certificate of Foreign Intermediary and tax exemption

### 14. Compliance with COVID-19 Requirements

- a. California and the City of Los Angeles are in a State of Emergency because of the COVID-19 pandemic. Due to the fluid nature of the pandemic, the City may enact various ordinances affecting the Contractor's obligations when entering into a

contract for the provision of services to the City. At the time of the execution of any contract for the provision of services with the City, the selected Contractor(s) shall comply with any new contract provisions.

- b. COVID-19 Notification (If applicable): The Contractor shall immediately notify the City in the event that any person who has performed services for the Contractor (including, but not limited to, employees, volunteers and contractors) at a site operated by City, on behalf of City, or under this contract, (1) has been diagnosed with COVID-19, (2) has been informed by a medical professional that the person is likely to have COVID-19, or (3) meets the criteria for isolation under the County of Los Angeles Public Health Officer Order for the Control of COVID-19: [http://publichealth.lacounty.gov/media/Coronavirus/docs/HOO/HOO\\_Coronavirus\\_Blanket\\_Isolation.pdf](http://publichealth.lacounty.gov/media/Coronavirus/docs/HOO/HOO_Coronavirus_Blanket_Isolation.pdf).

#### **D. CONTRACTOR EVALUATION ORDINANCE**

At the end of this contract, the City will conduct an evaluation of the contractor's performance. The City may also conduct evaluations of the contractor's performance during the term of the contract. As required by Section 10.39.2 of the Los Angeles Administrative Code, evaluations will be based on a number of criteria, including the quality of the work product or service performed, the timeliness of performance, financial issues, and the expertise of personnel that the contractor assigns to the contract. A contractor who receives a "Marginal" or "Unsatisfactory" rating will be provided with a copy of the final City evaluation and allowed 14 calendar days to respond. The City will use the final City evaluation, and any response from the contractor, to evaluate proposals and to conduct reference checks when awarding other personal services contracts.

## IV. PROPOSAL PACKAGE

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### A. GENERAL PREPARATION GUIDELINES

**If a proposer does not follow these instructions and/or information is omitted or a required attachment is not submitted, the bidder/proposer may be determined to be ineligible and excluded from the review.**

1. The proposal must be submitted in the legal name of the firm or corporation and the corporate seal must be embossed on the original proposal. An authorized representative of the proposer organization who has legal authority to bind the organization in contract with the City must sign the proposal. The submitted proposal must include a scanned version of the embossed seal and authorized signature.
2. Proposers must submit one (1) original Proposal. The proposal must be marked "Original" on the cover and must bear the actual "wet" signature(s) of the person(s) authorized to sign the proposal.
3. All proposals must be accompanied by a cover letter that should be limited to **one page**. The letter must:
  - Include the title, address, telephone number, fax number, and e-mail of the person(s) who will be authorized to represent the proposer and each collaborator. Also include the above contact information for the proposer's contract manager and accounting liaison.
  - State the number of years of direct and/or related experience in administering part or all of the services solicited in this RFP.
  - Be signed by the person(s) authorized to bind the agency to all commitments made in the proposal and, if applicable, be accompanied by a copy of the Board Resolution authorizing the person(s) to submit the proposal. If a Board Resolution cannot be obtained prior to proposal submission, it may be submitted no later than **one (1) calendar week** after the proposal submission deadline.
  - Identify the individual or firm, which prepared or assisted in preparing the proposal. If that individual or firm will not participate in the implementation of the project, describe how the transfer of responsibility will occur to ensure timely implementation.
4. Proposals must be submitted in the English language. Numerical data must be in the English measurement system; costs must be in United States dollars.
5. Narratives are limited to the number of pages as indicated per narrative question and must follow these standards:

- Font size – 12 points
- Margins – At least 1 inch on all sides
- Line spacing – Single-spaced

**Pages in excess of the stated limits will not be read and will not be considered in scoring.**

6. Each page of the proposal, including attachments, must be numbered sequentially at the bottom of the page to indicate Page \_\_\_ of \_\_\_.
7. Please use the indicative mood (will, shall, etc.) in narratives rather than the subjective (would, should, etc.) so that proposals can be easily converted to contract form.
8. The Proposal Checklist lists all narratives, attachments and certifications that must be included in the proposal. In assembling the completed proposal, please insert the attachments and certifications where they are indicated in the Proposal Checklist. The Proposal Checklist will serve as your Table of Contents (See **Attachment 1**).
9. Answers should be as concise as possible while providing all the information requested.
10. In completing the narratives and attachments, including the fee schedule, please include and clearly identify the services to be provided by and the demonstrated ability of subcontractors, if any.

## **B. DOCUMENTS TO BE COMPLETED**

Proposers must complete and submit all of the attachments and certification forms listed. **Do not assume that any document is not applicable.** If the proposer does not follow all the instructions and/or requirements in this RFP, the proposer may be determined to be ineligible and excluded from the review. Use the Proposal Checklist as a guide.

## **C. PROPOSAL CHECKLIST**

The **Proposal Checklist (Attachment 1)** is to serve as the Table of Contents for your proposal and as a guide for all documents, which must be submitted with the RFP. It lists all Narratives, Attachments, and Certifications (if applicable) that must be included as part of the proposal. Indicate in the page number column where the information can be found in your proposal. In assembling the complete proposal, please insert the attachments where they are indicated in the Proposal Checklist.