

Technical Proposal

Suppliers should complete their proposals as succinctly as possible. Response to 3.1-3.4 below should not exceed 25 pages. Work Product examples for section 3.5 may be attached as a separate document.

Supplier proposals must be submitted in the format outlined below. To be considered, the proposal must respond to all requirements in this part of the RFP.

As a reminder, no cost information should be included in the Technical Proposal Document. Appendix B (Technical) and Appendix C (Cost) must be separate documents.

Select the category/categories that are being submitted for consideration:

	PRG-01 Development Professional Services
	PRG-02 Program Consulting and Project Management
	IT-01 Technology Consulting and Project Management
	IT-02 IT Development
	HR-01 HR Consulting
	COM-01 Communications Consulting
	COM-02 Communications Development Services
	COM-03 Conference and Event Planning and Presentation

3.1 Service Capabilities

Describe your ability to deliver value added services that uniquely address the service category or categories.

Firms:

Provide information on the depth, breadth, and historical experience of your organization to satisfy the requirements. This includes the number of employees, founding date of their company, BRIEF company overview, description of company values, key areas of specialization, and any other differentiating information about the ability to provide the requested services.

Individuals (independent consultants):

Provide historical experience, areas of specialization and any other differentiating information about the ability to provide the requested services.

3.2 Work Approach

Describe the details of how the services being performed will be managed. This will include your specific methodologies for completing deliverables, project management tools and techniques, communications, and methods to evaluate and mitigate risk.

3.3 Project Resources

Resource Requirement: *Service Providers must have a Principal or Project Manager with a minimum of three (3) years of demonstrated experience in providing training and/or consulting, or equivalent experience (as evidenced by other data submitted), in the selected service category*

Firms:

Provide an organizational chart that includes resources that would most likely be assigned to the PHFA account. This should include a designated program/project manager. Provide bios for key personnel in the format provided. Designate if they are direct staff or qualified contractors. Clearly specify any subcontractors, particularly if they are small business enterprises. Describe your commitment to training, partnering with and hiring MBE/WBE/DBE subcontractors and suppliers.

Individuals (independent consultants):

Provide a resume which shall include a description of the responsibilities, abilities, and experience in areas comparable to the service category for which you are requesting qualification.

3.4 Prior Experience and References

Experience Requirement: *Service Providers must have experience in at least three (3) projects similar to the service categories for which they are requesting to qualify.*

Provide at least three (3) business references for similar scope to include reference organization name, organization address, contact name, contact phone, contact email, and brief description of services and accomplishments.

3.5 Technical Portfolio or Work Product Examples

Submit an original work product related to one project in each service category for which you are proposing. Each document submitted must be less than 15 pages (you may submit an excerpt from a larger document). Acceptable work product includes:

Category #	Service Category	Acceptable Work Product
PRG-01	Development Professional Services	<p>For this category, a resume must be provided that includes the following information:</p> <ul style="list-style-type: none"> - At least five years of experience in either the underwriting of LIHTC developments and/or the creation/development of budgets and operating proformas for the LIHTC developments. Experience could be at a development company, financial institution, state housing financing agency, consulting firm, a federal agency, and/or a local municipal government agency. - Experience with Microsoft Office products, especially Excel <p>Must provide at least three related references.</p> <p>Consultant must disclose any current or past (in the last three years) work -related interactions with PHFA including but not limited to working for a developer or a consultant company that applied to PHFA for agency financing and/or LIHTCs. Selected consultants will be expected to certify that they will not apply to PHFA for funding (on behalf of himself/herself, a development company, and/or a consultant) during a three-year period after the end of any consulting contracts with PHFA.</p>
PRG-02	Program Consulting and Project Management	<p>-Thought leadership -Case Study</p>

		<ul style="list-style-type: none"> -Assessment, program plan or strategy document example (may be anonymized or redacted to protect intellectual property) -Program presentation -Project plan example
IT-01	Technology Consulting and Project Management	Information that demonstrates the consultant's ability to communicate with various levels of complex audiences. (sample project plan, evaluation plan, PPT presentation)
IT-02	IT Development	<ul style="list-style-type: none"> -Sample documentation written for end user use. -Information that demonstrates the consultant's level of programming, problem solving and communication skills -Requirements Traceability Matrix -Functional Specification -Technical Specification
HR-01	HR Consulting	<ul style="list-style-type: none"> -Thought leadership -Case Study -Assessment, program plan or strategy document example (may be anonymized or redacted to protect intellectual property) -Program presentation -Project plan example
COM-01	Communications Consulting	<ul style="list-style-type: none"> -Thought leadership -Case Study -Assessment example (may be anonymized or redacted to protect intellectual property) -Program presentation -Marketing Plan
COM-02	Communications Development Services	-Provide portfolio examples of website design
COM-03	Conference and Event Planning and Presentation	<ul style="list-style-type: none"> -Conference/meeting program or website link with session descriptions and a summary of the tasks performed by the service provider for that event For presenters: presentation or video of relevant topic