Invitation to Qualify
Request for Proposal
for

Consulting and Professional Services

RFP Number: 2021-09-ITQ-01

Issue Date: 09/13/21
Amendment 1: 12/8/21
Response Date: Open
Issuing Officer: Kim Burky
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Section 1: General RFP Overview and Instructions

1.1 Organization Overview

The Pennsylvania Housing Finance Agency (“PHFA” or “the Agency”) was established by the legislature in 1972. PHFA works to provide affordable homeownership and rental apartment options for older adults, low- and moderate-income families, and people with special housing needs. Through its carefully managed mortgage programs and investments in multifamily housing developments, as well as funding provided for community development projects, PHFA also promotes economic development across the state. Additional information about PHFA can be found on our website: www.phfa.org.

1.2 RFP Overview

As a state-affiliated entity, PHFA complies with the Commonwealth Procurement Code, Act 57 of 1998, as amended (the “Procurement Code”). This RFP is being issued as part of a competitive bidding process for products and services and will take into consideration the technical merit based on the evaluation criteria described as well as cost based on consistently applied weighting criteria. This RFP contains instructions governing the proposals to be submitted and the material to be included therein; a description of the services to be provided; requirements which must be eligible for consideration; general evaluation criteria; and other requirements to be met by each proposal. It is important for suppliers to review the instructions provided and submit in accordance with those instructions to avoid being deemed non-responsive to the submission requirements.

1.3 Type of Contract and Contract Terms

It is proposed that, if a contract is entered into as a result of successful negotiations, the selected supplier will be required to sign a standard Commonwealth of Pennsylvania contract. This agreement will contain the provisions shown in contract Terms and Conditions found in Appendix A of this request for proposal. Proposal/contract negotiations may be undertaken with suppliers whose proposals show them to be qualified, responsible, and capable of performing the work. The “Work Statement” as negotiated, will be incorporated into the standard contract.

The supplier will be deemed to have accepted the standard terms and conditions, except as are expressly disputed in the Supplier’s proposal. If exceptions are expressly disputed, the Supplier must submit a “redlined” version of the terms or conditional showing all modifications proposed and an explanation as to why the modification is required. In addition, Suppliers must submit any additional contract terms, order forms or additional documents for which the Supplier requires signature from the Agency. The supplier’s
willingness to accept the Appendix A Terms and Conditions, with minor clarifications, shall be an affirmative factor in the evaluation of the Supplier’s proposal.

There are some terms that are not negotiable as they are required to do business with the Commonwealth of Pennsylvania. Prohibited contract clauses include assignment clauses, law of the contract, attorney’s fees, court costs, entry of judgment, indemnity and hold-harmless clauses, arbitration clauses, payment in advance and payment of insurance. These clauses may not be redlined.

The terms and conditions of the master contract will apply to any awarded statement of work created with reference to that contract. An example of the RFQ template is provided on the PHFA procurement page. No additional terms and conditions may be added by a supplier to a statement of work.

1.4 Rejection of Proposals
The Agency reserves the right to reject any or all proposals as a result of this request or to negotiate separately with competing Suppliers.

1.5 Incurring Costs
The Agency is not liable for any cost incurred by the Supplier prior to issuance of a contract.

1.6 Amendment to the RFP
If it becomes necessary to revise any part of this RFP, an amendment will be issued and posted with the original RFP posting on the PHFA website. It is the responsibility of the Supplier to look for potential amendments. If a Supplier registers their intent to bid with the Issuing Officer via email, they will receive an email notification if an amendment is posted.

1.7 Economy of Preparation
Proposals should be prepared simply and economically, providing a straightforward, concise description of the Supplier’s ability to meet the requirements of the RFP. Suppliers should not include extraneous marketing materials or promotional items.

1.8 Oral Presentation, Demonstration and Sample Work Products
Suppliers who submit proposals may be required to make an oral presentation of their proposal to the Agency to provide an opportunity for the Supplier to clarify their proposal to ensure mutual understanding. For certain types of products and services, demonstrations of the product (such as software) or sample work products may be requested. These requirements will be outlined in Section 3.
1.9 Disclosure of Proposal Contents
Cost and price information provided in proposals will be held in confidence and will not be revealed or discussed with competitors, except to the extent required by law. All other material submitted becomes the property of the Agency and may be returned only at the Agency’s option. PHFA has the right to use any or all ideas presented in any reply to the RFP. Selection or rejection of the proposal does not affect this right. Where confidential or proprietary information is required, or should the Supplier deem it necessary to submit such matter, mark each page/section in large bold type (PROPRIETARY INFORMATION). Please be advised that effective January 1, 2009, all responses to this procurement opportunity are subject to the Pennsylvania Right-to-Know Law, 65 P.S. 65 P.S. Section 67.101, et seq. (or any successor applicable law). The Right-to-Know law permits any requestor to inspect and/or copy any record prepared and maintained or received in the course of the operation of a public office or agency that is not subject to the enumerated exceptions under the law. If your response to the procurement opportunity contains a trade secret or confidential proprietary information, you should include with your response a separate signed written statement to that effect. Should your response become the subject of a Pennsylvania Right-to-Know request, you will be notified by the issuing office and a determination will be made whether the claimed trade secret or proprietary information is subject to disclosure.

1.10 New Releases
New releases pertaining to any awards or work performed will not be made without prior Agency approval, and then only in coordination with the Issuing Office.

1.11 Contractor Responsibility Program
Suppliers must certify that they are not currently under suspension or debarment by the Commonwealth of Pennsylvania, any other state, or the federal government to the best of their knowledge. Additionally, Suppliers must certify that they are not tax delinquent with either the Pennsylvania Department of Revenue or the Pennsylvania Department of Labor and Industry to the best of their knowledge. Suppliers that do not complete that certification will be deemed non-responsive and their proposal will not be accepted or considered. Reference Appendix D.

1.12 Cost Data
All cost data for the proposal shall be submitted as a separate document (Appendix C) apart from the Technical Proposal (Appendix B). Absolutely no pricing can appear anywhere in the Technical Proposal. Failure to meet this requirement will result in automatic disqualification of the proposal.

1.13 Debriefing Conferences
Suppliers whose proposals are not selected will be notified of the name of the selected supplier and will be given the opportunity to be debriefed. The Issuing Office will schedule the time and location of the debriefing.
1.14 Supplier Diversity
PHFA is an equal opportunity employer and is committed to ensuring contracting opportunities for minority owned businesses (MBE), women owned businesses (WBE) and other small disadvantaged businesses (DBE). PHFA encourages diversity in all contracting and supplier relationships. Suppliers should provide information regarding diversity in their staff resources and in their partnerships in their technical response as part of section 3.9 Resources. Special consideration will be given to those suppliers that demonstrate a commitment to diversity and inclusion.

1.15 COVID-19 Workplace Safety
PHFA is closely monitoring the evolving COVID-19 situation and taking proactive measures to preserve the health and safety of our employees, their families, our business partners, and the communities we serve. If you are a supplier that has a requirement to perform services on-site, the following measures must be followed:

- Any supplier resources working on-site must be fully vaccinated
- On-site visitation must be scheduled in advance and the supplier must have a PHFA contact meet them inside the entrance to the building for the screening process
- Follow social distancing practices
- All on-site resources must wear a mask

These measures will be updated accordingly based on state and federal guidelines.
Section 2: Request for Proposal Instructions and Work Statement

2.1 Purpose
The purpose of this request for proposal (RFP) and resulting multiple-award contracts is to provide PHFA with Consulting and Professional Services to address agency requirements on a per project/scope basis.

This contract will be structured as a multiple-award contract. Each eligible Service Provider who meets the mandatory requirements of the RFP and demonstrates acceptable knowledge and performance for the category requirements will be deemed qualified for a master contract. The contract is not a guarantee of services but provides the supplier the opportunity to bid on requested scope for that category. PHFA may solicit project quotes from eligible Service Providers and select the one that best meets the project requirements based on the specific project selection criteria. Individual service purchase orders will be issued against the Service Provider master contract for each project. An example of the RFQ template is provided on the PHFA procurement page.

This RFP may be amended to update the service categories and/or category requirements.

2.2 Issuing Office
This RFP is issued by the following Issuing Officer. This officer is the sole point of contact for this RFP.

Name: Kim Burky
Title: Transformation Project Manager
Address:
211 N. Front Street
Harrisburg, PA 17101
Phone: 717-780-3802
Email: kburky@phfa.org

2.3 Questions
Questions or requests for clarification regarding this RFP must be submitted via email to the issuing officer using the email: procurement@phfa.org

All contacts regarding this RFP must be made through the issuing office. Only information supplied by issuing office, including responses to questions regarding the RFP, should be used in preparing proposals. All other contacts or information received regarding the subject prior to the release of this RFP should be disregarded in preparing responses. Any violation of this condition is cause for the Agency to reject a Supplier’s proposal. If it is later discovered that any violations have occurred, the Agency will reject the proposal.
2.4 RFP Summary Description and Background
PHFA is issuing this Request for Proposal to find qualified suppliers to provide support for the programs and services we provide in fulfilling our Agency mission.

2.5 Contract Length
The Agency desires to enter in a three (3) year master contract. The total proposed term of the contract is not to exceed five years.

2.6 Pre-Proposal Conference
Choose one
☑ A pre-proposal conference is not necessary for this solicitation
☐ A pre-proposal conference will be held on the date and time. Although this is a virtual conference, it is requested to limit representation to no more than 2 attendees per Supplier. The purpose of this conference is to clarify any points in the RFP which may not have been clearly understood. Questions should be forwarded to the Issuing Office prior to the meeting to ensure that sufficient analysis can be made before an answer is supplied. The preproposal conference is for information only. Answers furnished during the conference will not be official until verified in writing by the issuing office.

2.7 Product Demonstration/Proposal Presentation
Choose one
☑ A product demonstration or presentation is not required for this solicitation
☐ Suppliers that achieve a minimum qualifying score will be asked to provide a proposal presentation. Further instructions will be provided upon down-selection and an outline will be provided in advance to ensure consistency in what is presented and evaluated.
☐ This solicitation will require a demonstration of __________ (ex. Software) for suppliers that achieve a minimum qualifying score. Further instructions will be provided upon down-selection and a script will be provided in advance to ensure consistency in what is presented and evaluated.

2.8 Scope:
The contract scope will cover the categories of services described below. A service provider may bid on multiple categories if qualified to do so. The description provides an overview of tasks, but the specific tasks will be defined with a scope of work:

<table>
<thead>
<tr>
<th>Category #</th>
<th>Service Category</th>
<th>Description of Tasks</th>
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<tbody>
<tr>
<td>PRG-01</td>
<td>Professional Service/Financial Consultants who can underwrite 4% and/or 9% Low Income Housing Tax Credit Developments</td>
<td>Consultant(s) will be assigned to review development proposals / applications on an as needed basis. The consultant(s) will augment existing staff and be expected to coordinate with PHFA staff. Ability to</td>
</tr>
</tbody>
</table>
work independently is a must. Work may be conducted remotely but the consultant may need to travel to PHFA’s Harrisburg headquarters on occasion.

1. Reviewing multi-tabbed LIHTC applications
2. Entering, reviewing, and editing multi-tabbed underwriting spreadsheets into Excel
3. Working with PHFA development staff to identify financing gaps and make recommendations as to if the Agency should provide Agency resources
4. Corresponding with the developer and PHFA staff from several departments including Development, Legal, Tech Services, and Housing Management
5. Preparing Board writeups, pre-commitment packets, and other PHFA documents
6. Working with PHFA Legal and Development Staff to close Agency financing
7. Working with PHFA staff to follow LIHTC rules and regulations

<table>
<thead>
<tr>
<th>PRG-02</th>
<th>Program Consulting and Project Management</th>
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<tbody>
<tr>
<td></td>
<td>-Develop, in consultation with key stakeholders and staff, strategy, goals, activities, outputs and impacts for key Agency programs and provide support and advisory services for the execution and communication of program strategies and activities</td>
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<td>-Monitor achievement of objectives and adherence to task timelines</td>
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<td>-Provide support for advisory committees in the form of reports, technical</td>
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<tr>
<td>IT-01</td>
<td>Technology Consulting and Project Management</td>
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<td>-------</td>
<td>---------------------------------------------</td>
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|       | assistance, attendance at meetings and meeting action items  
- Planning, coordinating, directing, negotiating, examining, analyzing, and interpreting financial and or construction data associated to PHFA financial programs, grants, energy assistance programs, rental assistance programs, single family homeowner programs or any other technical assistance pertaining to mortgage lending, energy assistance, grants, rental assistance, business lending, special loans, multifamily housing finance, housing rehabilitation, infrastructure, and neighborhood rehabilitation.  
- Develop, in consultation with key stakeholders and staff, project plans, presentations, strategies, activities/tasks, and impacts  
- Perform analysis to assess business challenges and requirements and document requirements to include gap analysis  
- Prepare evaluation documents to assess the implementation of a technology plan to include infrastructure, cost, security, functionality, data analytic capabilities and end user impact  
- Assist in the development of high-level enterprise-wide planning documents  
- At various levels, manage the delivery of current or new technology projects  
- Provide advisory guidance for project governance and organizational change management |

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<tr>
<th>IT-02</th>
<th>IT Development</th>
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</table>
|       | - Develop functional and technical specifications  
- Creation and maintenance of integrated or standalone applications and databases  
- Develop documentation (which may include training materials) for existing or new systems |
| HR-01 | HR Consulting | -Develop integration applications between existing applications  
-Troubleshoot hardware and software issues for documentation or problem resolution  
-Perform routine database, operating system, or systems administration duties  
-Perform other tasks related to application lifecycle management  
-Avising management on the administration of human resources policies and procedures  
-Take responsibility for the successful and timely completion of human resource related projects  
-Conduct HR research, track and analyze metrics and suggest insight to improve decision making  
-Advise HR personnel about any recurring issues and problems  
-Help HR professionals in recruiting, training, and management of employees  
-Create and design plans for applying new techniques for driving change in HR processes  
-Developing, revising, and implementing HR policies and procedures  
-Suggest and manage implementation of suitable HR technology for business advancement  
-Provide guidance on new trends and advancements in human resources  

| HR-02 | Employee Recruitment (added in Amendment 1) | -Provide guidance on recruitment branding and strategies  
-Provide services to identify, screen, interview and recommend candidates for consideration  

| HR-03 | Professional Development/Training/Instructional Design (added in Amendment 1) | Work together with PHFA leadership to provide professional development materials and training services to include but not limited to:  
-HR compliance |
| COM-01 | Communications Consulting | Work together with PHFA to achieve marketing and communications goals to include:

- Review the current communication and marketing environment/strategy and make recommendations to enhance, support and augment the program.
- Writing: Review existing print and website materials. Make recommendations for revisions, enhancements, updates as needed.
- Draft new communication pieces for emails, executive-level talking points and/or articles, e-newsletters, online stories, constituent, and sponsor communications
- Outreach: Help find new ways to reach current and potential constituents
- Messaging: Work to ensure that core messages are consistent throughout all communication (print, online and other) |

| COM-02 | Communications Development Services (updated in Amendment 1) | WEBSITE:

Collaborating with clients and stakeholders on website design.
- Designing user-friendly and visually appealing interfaces.
- Integrating data, applications, images, videos, and plugins.
- Troubleshooting, testing, and demonstrating website prototypes.
- Incorporating end-user feedback into the website design.
- Completing website development projects on time and within budget. |
- Overseeing the live deployment of the website and enhancing the website's performance.
- Preparing progress updates and documenting website development processes.
- Advising on current developments, technologies, and trends in website design.

OUTREACH/COMMUNICATION DESIGN:
- Design of outreach, branding and communication materials as needed to include but not limited to brochures, posters, social media posts, workbooks, signs, promotional items, presentation material, newsletters, articles, or other forms of communication and branding

<table>
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<tr>
<th>COM-03</th>
<th>Conference and Event Planning and Presentation</th>
<th>Planning:</th>
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<tbody>
<tr>
<td></td>
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<td>- Establishing a conference theme and focus; setting the agenda and tracks</td>
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<td>- Selecting conference and meeting sites, reserving conference, and lodging facilities, contracting, or arranging for catering and all other site logistics</td>
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<td>- Advertising and outreach, preparing and distributing flyers, letters, brochures to mailing lists; providing content for website</td>
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<td>- Accepting registrations by mail and electronically</td>
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<td></td>
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<td>- Securing speakers, facilitators and presenters and assist in all presentation and session arrangements</td>
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<td>- Preparing evaluation forms for the conference and individual sessions; distributing, collecting, and compiling evaluations</td>
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<td>Facilitation/Presenting:</td>
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<tr>
<td></td>
<td></td>
<td>- Finalizing session logistics for speakers, including AV, and order of presentation</td>
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<td></td>
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<td>- Introducing speakers, topics, themes and facilitating discussion</td>
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<td>- Making presentations in areas related to the PHFA mission</td>
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</table>
Collecting/reviewing session evaluations and making recommendations for future events based on feedback

| COM-04 | Translation/Interpretation Services (Added in Amendment 1) | Document translation services:  
|Translation, formatting, revision, and field testing of foreign language forms  
|Translation, formatting, and revision of posters, brochures, documents, correspondence, web pages or other informative materials  
|Verbal services:  
|Verbal translation services in person, by phone or via virtual tools |

| COM-05 | Printing and Mailing Services (Added in Amendment 1) | -Printing services to include documents, reports, forms, promotional materials, conference materials and any other marketing, communication, or operational printing needs  
|-Bulk mailing services |

### 2.9 Qualification Requirements
To be placed on the multiple-award contract, participating Service Providers must meet all requirements of this Request for Proposals (RFP). To become eligible, Service Providers must:

1. Submit a complete proposal to this RFP, including providing responses and documentation for each service category for which they are applying; AND
2. 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 AND
3. Have experience in at least three (3) projects similar to those service categories for which they are requesting to qualify; AND
4. Achieve an acceptable score, as determined by PHFA, in the evaluation of the Service Provider’s qualifications and experience; AND
5. Comply with contractor responsibility and integrity requirements and otherwise be eligible to enter into contracts with PHFA. This factor includes but is not limited to those provisions contained in sections 1.3, 1.11 and 1.15 of this RFP.

### 2.10 RFP Response Date
Submittals to qualify under this RFP will be accepted if the RFP is posted as open on the website. Proposals will be reviewed on at least a monthly basis to determine if the submittal meets the requirements for a qualification contract.
All proposals are due via email to the Issuing Officer. Electronic files saved in a PDF format are encouraged. Please notify the issuing officer if you are unable to submit the files via email.

Section 3: Technical Information required from the supplier

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. Reference Appendix B. 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.

Service Providers must select the category or categories (described in the scope section 2.8) for which you are requesting qualification. The technical proposal response for 3.1-3.4 can be used for multiple categories but a work product example must be submitted for each category requested.

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. Acceptable work product includes:

<table>
<thead>
<tr>
<th>Category #</th>
<th>Service Category</th>
<th>Acceptable Work Product</th>
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</table>
| PRG-01     | Development Professional Services | For this category, a resume must be provided that includes the following information:  
- 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

Must provide at least three related references.

**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. Suppliers must certify in their response 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.

<table>
<thead>
<tr>
<th>Program Code</th>
<th>Program Description</th>
<th>Requirements</th>
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</thead>
</table>
| PRG-02       | Program Consulting and Project Management | Provide an example of at least one of the following:
  - 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 |
| 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 | Provide an example of at least one of the following:
  - Sample documentation written for end user use.
  - Information that demonstrates the consultant’s level of programming, |
| HR-01 | HR Consulting | Provide an example of at least one of the following:  
- 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 |
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<tbody>
<tr>
<td>HR-02</td>
<td>Employee Recruitment</td>
<td>- Provide a process flow of the recruitment process and an example of either a high-level recruitment strategy or recruitment branding</td>
</tr>
</tbody>
</table>
| HR-03 | Professional Development/Training/Instructional Design | Instructional Design:  
- Provide an example of a course designed for asynchronous online training to include a knowledge check or quiz  
- Provide an example of a learner assessment or course outline  
Training:  
- Provide a listing of some of the courses available  
- Provide an example of learning resources/materials that support a course  
- Provide an example of a knowledge check/learner knowledge assessment |
| COM-01 | Communications Consulting | Provide an example of at least one of the following:  
- Thought leadership  
- Case Study  
- Assessment example (may be anonymized or redacted to protect intellectual property)  
- Program presentation  
- Marketing Plan |
<table>
<thead>
<tr>
<th>COM-02</th>
<th>Communications Development Services</th>
<th>-Provide portfolio examples of website design and designed materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>COM-03</td>
<td>Conference and Event Planning and Presentation</td>
<td>-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</td>
</tr>
<tr>
<td>COM-04</td>
<td>Translation/Interpretation Services</td>
<td>-Example of a form, document or web page translated from English to another language ** All submissions for this category must include a complete list of languages supported</td>
</tr>
<tr>
<td>COM-05</td>
<td>Printing and Mailing Services</td>
<td>At least two examples of printed materials (submissions for this category should be original printed materials and sent via mail to the issuing officer/address listed in section 2.2)</td>
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</tbody>
</table>

**Section 4: Cost Information required from the supplier**

Provide your fee schedule associated with providing services for each service category you are proposing. Include fees for each level of staff. Include any additional costs such as retainer fees, administrative fees, minimum fees and so forth, if applicable. All rates quoted must be inclusive of all expenses.

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.
Section 5: Criteria for Selection

All proposals received from Suppliers will be reviewed and evaluated by a committee of qualified Agency personnel. This committee will recommend for selection any proposal which meets the requirements of the RFP.

The following areas of consideration will be used in making the selection:

5.1 Supplier Qualifications/Service Capabilities
This refers to the ability of the supplier to meet the terms of the RFP, especially time deadlines, quality, relevancy, financial ability to undertake the size of the project, etc.

5.2 Work Approach
Emphasis includes the techniques for managing scope tasks, risk management and communication.

5.3 Professional Personnel
This refers to the competence of the personnel who would be assigned to the tasks by the Supplier. Qualifications include experience, education, and work with similar clients. This evaluation will include emphasis placed on the qualifications of the Supplier project manager.

5.4 Experience and References
This refers to the relevance and quality of the references and experience provided.

5.5 Technical Response/Work Product
Quality and relevance of the work product example provided.

5.6 Terms and Conditions
Ability of the supplier to accept the stated Terms and Conditions as outlined in Appendix A.

5.7 Cost
While this area will be weighted heavily, it is not the only deciding factor in the selection process. Cost information will be provided in Appendix C. Absolutely no pricing can appear anywhere in the Technical Proposal. Failure to meet this requirement will result in disqualification of the proposal.
Section 6: Request for Proposal Submission Instructions

All proposals are due via email to the Issuing Officer. Electronic files in a PDF format are encouraged. Please notify the issuing officer if you are unable to submit the files via email.

Email to: procurement@phfa.org

Each Appendix should be a separate attachment in the email.

Each submission should include the following attached documents:

1. Appendix A: Acknowledgement of review of Standard Terms and Conditions, and any potential redlines. Also attach any additional forms or documents that may require PHFA signature as part of the contract so they can be reviewed in advance.
2. Appendix B: Technical Proposal
3. Appendix C: Cost Proposal
   ** IMPORTANT NOTE: The Cost proposal must be attached as a separate document from the Technical Proposal in the email.
4. Appendix D: Contractor Responsibility Certification
5. Optional: cover letter to declare any proprietary information (reference section 1.9)