

## **Addendum No. 1 to Asset Management System Administration RFP**

1. Revisions to the Schedule of Events
  - a. The HCD Staff Q&A Technical Assistance and Use Case Demonstration Session for Applicants is rescheduled to Tuesday, May 6, 2025 at 11:30 am
2. Section V. RFP, Application Submission, Review and Funding Process
  - A. **Mandatory Bidders Conference and HCD Q&A Technical Assistance Session**

Those interested in submitting an application in response to this RFP are required to attend a Mandatory Virtual Bidders' Conference, where HCD will present the RFP content, the application formats, and instructions for application submittal, 11:00 am Thursday, April 17, 2025 & ~~11:30 am~~ ~~10:00 am~~ Tuesday May 6. You can register for the April 17 event using this [link](#). You can register for the May 6 event using this [link](#).

The HCD staff Q&A Technical Assistance and Use Case Demonstration Session for Applicants is an opportunity for applicants to have a live session with HCD staff who use the current system in a variety of unique ways. This time ensure applicants have a comprehensive understanding of the system needed to meet HCD's current and future needs.

**COUNTY OF ALAMEDA  
COMMUNITY DEVELOPMENT AGENCY  
HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT**

**Notice of Funding Availability and  
Request for Proposals (RFP)**

*Asset Management Administration*

**RELEASE DATE: Monday March 31, 2025**

**Application Due Date**

Applications are due **May 12, 2025 by 5pm**. This is an electronic submission; hard copies will not be accepted. The application will be submitted via email to [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org). Applicants are strongly encouraged to submit applications in advance of the deadline to avoid technical issues. **If you have any questions, please contact at [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org)**

*Please be aware that under California Public Records Act, all documents submitted in response to this RFP are considered part of the public record and will be made available to the public, upon request, following the application deadline.*

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## I. Funding Available

Through this Notice of Funding Availability (NOFA) and Request for Proposals (RFP) the Alameda County Housing and Community Development Department (HCD) announces funding available for development and administration of a Countywide asset management system.

HCD's Asset Management system will be used by HCD staff and development partners to solicit bids for funding opportunities, collect project data, store contracts and regulatory documents, and monitor projects for compliance through their lifespan. The system administrator will take responsibility for developing a system that meets HCD's needs, providing training materials to HCD staff and developers, transferring existing records into the new system, and other roles as defined by this RFP and HCD staff.

HCD requests proposals from qualified parties with significant familiarity with property management, application systems, database training, and agile development to design and build an asset management system.

The successful applicants must be willing and able to meet Alameda County's contracting requirements as set forth in this RFP. The initial term of contract is anticipated to be approximately two years and subject to annual appropriations, after which time, by mutual agreement and if additional funds are available, the contract may be extended for up to seven years at agreed prices with all other terms and conditions remaining the same.

HCD will serve as the main point of contact for the selected applicants, including preparing the contract for approval by the Alameda County Board of Supervisors, overseeing entity contract implementation, and ensuring outcomes are met.

## II. Application Due Date

Applications must be submitted via email to [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org) by **5pm May 12, 2025** ("**Application Due Date**"). Additional information on the application process will be provided at the Mandatory Bidders' Conferences. If you have any questions, contact HCD at [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org).

*Applications become public records. Applicants should understand that, under the California Public Records Act, all documents that are submitted in response to this RFP are considered part of the public record and will be made available to the public, upon request, following the application deadline. The County reserves the right to suspend, amend, or modify the provisions of this RFP, to reject proposals, to negotiate modifications of proposals, or to award less than the full amount of funding available. Alameda County is an Equal Housing Opportunity and Accessible Housing Provider.*



## Schedule of Events

EVENT	TARGET DATE
Post/Publish RFP on HCD Website	Monday, March 31, 2025
*Mandatory Bidders' Conference on RFP, Process, Submission Requirements	Thursday, April 17, 2025
HCD staff Q&A Technical Assistance and Use Case Demonstration Session* for Applicants	<del>Monday</del> <del>Tuesday</del> May <del>65</del> , 2025
Written questions to due to HCD <a href="mailto:HCDRFP@acgov.org">HCDRFP@acgov.org</a>	Tuesday, May 6 2025 by 5:00pm
HCD Issues FAQ Document	Wednesday, May 7, 2025
<b>Application Due</b>	<b>Monday May 12, 2025 5:00 p.m.</b>
Begin County Selection Committee Review Period / Completeness Review, Additional Applicant Information Requests	<b>Monday, May 12, 2025</b>
<b>Applicant Tech Demos and Review Panel Q&amp;A</b>	<b>May, TBD based on availability</b>
Earliest Intent to Award Funds or Notice of Intent to Not Award Funds letters sent to RFP applicants	May 2025
**Board of Supervisors meeting to approve funding recommendations and contracts	July 2025
<p><i>*Mandatory Bidders' Conference and Technical Assistance Session: technical assistance sessions will be offered for prospective applicants as a virtual meeting. Registration links and times will be posted on HCD's funding opportunities webpage. Attendance at one conference by applicants is mandatory. An overview of the RFP and instructions for application submittal will be provided.</i></p> <p><i>**Please note that these are tentative dates that may need to be adjusted based on changes to the Board of Supervisors meeting schedule, as well as any appeals that are submitted and addressed pursuant to the appeals procedures contained in this RFP.</i></p>	



### **III. Program Summary**

Alameda County HCD uses a digital asset management system to manage most business processes related to its portfolio of capital investments in affordable housing. These processes begin with the release of competitive funding opportunities, pass through several phases of development, and end with long-term financial and regulatory monitoring of occupied housing units. Critical features include, but are not limited to, the ability to enter, store, display, and summarize housing development project information, invoicing, contract information, and compliance information on a project-by-project and program basis. Multiple stakeholders: HCD staff, local jurisdictions, property developers and managers, and other organizations rely on this system to coordinate their efforts, store critical documents, track progress, demonstrate compliance, and provide the basis for analysis of administrative practice and portfolio performance to further policy development. The administrator of this system provides ongoing user support, training, and troubleshooting to ensure smooth operation, iterative optimization, and continuous development of new features.

Since 2016, the County has contracted with City Data Services (CDS). CDS constructed a platform that includes both program and asset management. Its current features include those listed above and are generally aligned with the threshold requirements for this competitive procurement. It serves as the asset management platform for over 130 projects with an additional 30 as active projects across 30 developers. City and County staff regularly meet with CDS staff to discuss improvements, changes, and best practices to be integrated into the system.

During seven years of continuous development in partnership with the current vendor, HCD has identified features and functions integral to HCD's administrative, monitoring, and reporting needs which are not currently provided due to practical or technical limitations embedded in the current platform. HCD seeks an integrated end-to-end solution supporting its capital investment portfolio from procurement through asset management. A competitive proposal will demonstrate superior capacity to streamline the collection and organization of information, more flexible system architecture, and improved interoperability with internal and external systems. HCD seeks a system administrator committed to thoughtful development of new features, interested in proactive collaboration towards innovative and scalable solutions (both technical and administrative), and ability to provide prompt technical and user support.

CDS is currently used by the Cities of Berkeley, Hayward, and San Leandro, among others, but the County system is not currently configured to provide integrated project information management across those cities. Alignment of compliance monitoring activities based on integrated information management is one example of the opportunities for more efficient administration the County hopes to effectuate through this procurement. Analysis of differences in standards and practices across jurisdictions is another. HCD staff will be collaborating with city peers during this procurement and as the platform is developed to ensure the awarded system meets those needs as best as is practical, a competitive application will demonstrate capacity for convergence.

Alameda County HCD expects peer jurisdictions with similar needs to observe and engage with this procurement process and anticipates a successful and well-functioning platform may eventually be adopted by additional government organizations. HCD has determined that

Program and Asset management platforms are being procured separately due to the differences in the required features and functions. **HCD encourages applicants to review both RFPs. Nothing prohibits a single vendor from being awarded both contracts and providing separate or integrated systems.**

#### **IV. Scope of Services**

The Scope of Services describes the platform's required functions and desired features. These requirements are grouped by business function, as broadly understood by HCD staff, but features and functions generally overlap and may have multiple applications. HCD Staff will make themselves available for up to two Q&As to support applicants understanding of current practices and business needs. HCD anticipates two phases, program development and implementation, with the current platform vendor (CDS) continuing to provide services through June 30, 2026 (program development phase). Applicants' submittals must include a detailed narrative **Program Plan** that responds to the Scope of Services described within this Section. Applications should demonstrate the ability to deliver the Scope of Services outlined herein, the specific features and functions to be included, and the process and schedule for their development and implementation of the with respect to the June 30, 2026 transition date and the timeline described below.

#### **Platform Functions**

AC HCD's Program management platform must facilitate the following key business functions. All required functions must be fully testable by January 2026 at the latest, and fully operational, with staff trained, by June 30, 2026

All functions listed below shall be considered standard system functions, while HCD maintains the ability to expand on all functions as needed in order to most efficiently and accurately track projects:

##### **Project Management (Construction Process):**

1. Procurement
2. Commitment
3. Board of Supervisors Process
4. Predevelopment
5. Construction
6. Lease-up/Conversion

##### **Invoicing of HCD**

1. Developer facing invoice creation
  - a. Supporting invoice documentation upload
2. Review by HCD
3. Delivery to Finance
4. Record of payments and current balance

##### **Developer/Owner Portal**





1. Submit applications, documents, correspondence, and invoices
2. View status of any submissions
3. Track awards, invoices and drawdowns
4. Review status and findings
5. Track deadlines

### **Asset Management**

1. Financial performance and stability (audits, operating budget etc.)
2. Maintenance of current owner and operator information (points of contact, insurances, physical needs assessments etc.)
3. Annual Report collection and review (Occupancy, Compliance, Financial)
4. Uploading of required documents
5. Housing quality inspection tracking (compatible with key systems incl HQS, HUD NSPIRE), including scheduling, collecting reports, and sending out letters
6. Mobile facing app for inspections (tablet software)
7. Tri-annual monitoring process, including document collection
  - a. collecting the relevant data,
  - b. writing the reports,
  - c. filling dynamic forms,
  - d. sending them out,
  - e. collecting responses,
  - f. establishing compliance with restrictions/preferences,
  - g. developing and recording findings,
  - h. sending out close out letters,
8. Noticing and receiving responsive, approving
9. Fee assessment and collection (invoicing and reminders, payment processing)
10. Automated notices – action items, missing information, incorrect input, etc.
11. Key indicators dashboard
12. Client facing dashboard

### **System of Record**

1. Access to procurements, award letters, board actions, agreements, notices, compliance findings, audits, invoicing, payments, and other primary documents as required by HCD staff
2. Automatic backup into HCD digital storage (local or cloud)

### **Analysis and Reporting**

1. Portfolio wide summaries for compliance
2. By project characteristic
3. By project status
4. Staff contacts
5. By geographies
6. By unit type/category
7. By funding source
8. Related to records
9. Internally accessible API

### **Compatibility**

- System must incorporate (via transfer) current asset and project data (Stored in CDS)
- Housing quality inspection platform for completed projects. (currently is HQS, needs to support NSPIRE)

### **Desired Features:**

Desired functions may be deprioritized during transition phases, but are expected to be developed and implemented as rapidly as practicable within the 2-year contract term. Desired functions may be subject to technical reinterpretation and negotiation due to feasibility, changing business needs, or evolving best practices during the contract period through collaboration with HCD.

### **Project Management (Construction Process):**

- User interfaces optimized and permissioned based on roles
- Standardized dynamic project budget tracking for application
- Automated features to confirm accuracy of project information compared to HCD requirements as outlined in RFPs, regulatory agreements, policies, guidelines, etc.
- Longitudinal tracking of project changes from application through construction
- Autosave abilities for applicant information
- Ability to combine all application related documents to prepare review packets that can be saved and/ or printed
- Templatization and automation of notices and agreements
- Allow for third party upload of budgets, project plans, photos, contracts, receipts, and other relevant documents from contractors, organizations, and companies in contract with HCD or applying for funding from HCD.

### **Invoicing of HCD**

- Allow developers to create and submit invoices easily for processing and fulfillment by HCD staff.
  - a. Developers should have the ability to upload, revise and remove supporting backup documentation.
- Reconciliation with Finance Access Database
  - a. Allow financial and loan information related to projects and programs to be utilized by other staff and departments
  - b. Updates, invoices, and payments should integrate with Financial database
- Identify incorrect information and create barriers or popups to ensure missing or incorrect information is added
- Conditional logic; the system should control what can be entered into certain fields Support for progressive automation of routine invoicing for monitoring and other asset management fees

### **Asset Management**

- Annual tracking of budgets vs actuals in support of operating subsidy
- Standardized dynamic project budget tracking for operation
- Enable Templatization and automation of notices

- a. Conditional logic; the system should control what can be entered into certain fields
  - b. Allow generation of compliance letters drawing from multiple sources
- Initiate automatic warnings or messages for action items, e.g., expiring insurance
- Allow drafting and tracking of edits of findings and reports
- Track debt service
- Track longitudinal information about assets i.e. Transaction reports, status changes
- Allow visibility into co-funders data

### **System of Record**

- Records are searchable, sortable, filterable, and otherwise easy to manipulate based on metadata
- Duplicates are kept in archive
- Provides longitudinal records, visibility into change over time
- Records are easily viewable in one readable dashboard
- Easy customization of reports using most or all fields, report request reflect the current state and fields in the system
- Integration of LLM (or similar) features for dynamic/adaptive report generation

### **Analysis and Reporting**

- Create, display, utilize, archive and print project related documents including budgets, contracts, and service plans.
- Support scheduled and on-demand reporting in widely used formats, especially MS Excel and templated PDF.
- Structure data using method which can support complex analysis and allow integration with data analysis software
  - a. Allow the specific filter or analysis of projects by type, size, funding source, location, population served, or other metrics required by HCD staff

### **Interoperability**

- System should include, to the greatest extent practicable and at the discretion of HCD staff all current data fields that are utilized by CDS users.
- Allow integration with downstream data and visualization systems potentially including but not limited to;
  - a. Microsoft SQL
  - b. Server
  - c. Power BI
  - d. SharePoint
  - e. Azure
  - f. Publicly accessible APIs
  - g. Elation
- Expansion of Housing Quality Inspection platform to include HQS and NSPIRE, as well as others as needed
- System should demonstrate potential to dynamically link project information with

other project funders or jurisdictions who share the platform in a federated or similar structure, and allow features to be turned on or off depending on a jurisdiction's needs

### **Ongoing Support/customer service**

- System supports ongoing maintenance requests, bug fixing, and ticket tracking systems where users can flag issues and track responses
- Requested changes are addressed in a timely manner
- New features are tested in advance and routinely integrated based on industry best-practices
- UI and other features tested with users and amended based on feedback
- Training materials regularly updated and available for both HCD Staff and other users

### **Timeline**

- I. Program Development
  - a. Upon Notice of Intent to Award, assign experienced Program Administration staff to complete the contract execution process with HCD before the Board of Supervisors meeting date.
  - b. Upon award of contract by the Board of Supervisors, participate in kick-off meeting with HCD staff and team organization staff to discuss overall program goals, schedule, and next steps.
  - c. Create or adapt software to meet stakeholder needs as outlined in the Scope of Services for this RFP
    - i. Meet regularly with HCD staff to assess completion of key goals for the system and creation of specific functions
- II. Testing and Training
  - a. Generate log-in information for all users
  - b. Debug, test internally, and ensure functionality of created system
  - c. Demonstrate system features to groups of HCD staff including representatives of the Policy, Development, Administrative, and Asset Management Teams to ensure functionality of specific functions
  - d. Develop training materials for HCD Staff, City staff in partner jurisdictions, and developers
    - i. Hold at training sessions for stakeholders
    - ii. Produce a handbook detailing the major functions of the system
    - iii. Develop training pamphlets, videos, or other resources for typical new users including new HCD staff and new developers
  - e. Develop processes for system administration and maintenance including
    - i. Create login credentials and system permissions for varying actors
    - ii. Develop a process for the solicitation and implementation of ongoing feedback from HCD staff and other users
    - iii. Determine admin privileges for certain members of staff
- III. Data Transfer
  - a. Transfer project, funding, and monitoring records from CDS into the new system

- b. Identify any records or information that were not successfully transferred
  - c. Notify and collaborate with staff in the event any errors arise
- IV. Operation and Ongoing Administration
- a. The system should be fully integrated and prepared for HCD to fully transition all uses and function to this system by June 2026.
    - i. Includes full development of system and training with HCD staff to be complete prior to June 2026.
  - b. Meet with HCD staff and attend meetings as necessary to provide information, training, and assistance as needed.
    - i. Including providing ongoing training and training resources for new RFPs and other solicitations that will require new users
  - c. Continue to make updates, system improvements, and add features as requested by HCD staff and development partners
    - i. Administrator should also proactively make improvements to the service as best practices or customization options become known
    - ii. The System should eventually be capable of handling similar services across jurisdictions within the County, allowing ease of use for staff and developers
    - iii. Administrator should assign consistent staff to liaise with HCD and ensure ongoing continuation of prompt support
    - iv. System updates, improvements, and added features should not negatively impact current functions of the system

## V. RFP, Application Submission, Review and Funding Process

### A. Mandatory Bidders Conference and HCD Q&A Technical Assistance Session

Those interested in submitting an application in response to this RFP are required to attend a Mandatory Virtual Bidders' Conference, where HCD will present the RFP content, the application formats, and instructions for application submittal, 11:00 am Thursday, April 17, 2025 & ~~11:30 am~~ ~~10:00 am~~ Tuesday May 6. You can register for the April 17 event using this [link](#). You can register for the May 6 event using this [link](#).

The HCD staff Q&A Technical Assistance and Use Case Demonstration Session for Applicants is an opportunity for applicants to have a live session with HCD staff who use the current system in a variety of unique ways. This time ensure applicants have a comprehensive understanding of the system needed to meet HCD's current and future needs.

### B. Application Requirement

Interested parties will apply directly to the County via email to [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org).

Applicants must attend at least one Mandatory Bidders conference before their applications are submitted. After the initial conferences, subsequent bidders' conferences will be scheduled as needed, in coordination with potential applications. In order to schedule a bidders' conference, send a request to [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org) and specify this RFP in the subject of the email.

### **C. Application Organization and Required Application Materials**

Applications must provide the following materials to be considered responsive to the Request for Proposal (RFP):

1. Cover Letter
  - a. Concise narrative summarizing applicant's proposal and qualifications.
  - b. Statement indicating acceptance of terms outlined in the RFP.
  - c. Signed by Principal, Executive Director, or Chief Executive Officer.
2. Application Response Packet (Appendix C)
  - a. All forms included in the County provided Application Response Packet, attached to this RFP as Appendix C, must be completed including:
    - i. Organization Information Form
    - ii. Applicant Information and Acceptable
    - iii. Exceptions, Clarifications, and Amendments Form (if applicable)
    - iv. Professional References Form
    - v. Submittal Addendum and Certifications Form
3. Organizational Capacity: Respondents should provide a clear and complete summary of organizational capacity illustrating their ability to develop and maintain a system that meets the requirements of this RFP. This should include:
  - a. An overview of the organization including summary of the organization, structure and management, jurisdiction, date formed, and experience specifically in the area of digital asset management.
  - b. List of Board Members and their affiliations a copy of a W-9, SLEB documentation, a summary of the organization's overall financial position, and any anticipated organizational changes in the next 24 months.
  - c. Resumes and position summaries for project staff who will have ownership over development, maintenance, and training for the system.
  - d. A summary of any litigation, arbitration, or other regulatory proceedings pending, adjudicated, or settled that the organization has been subject to within the last three years.
  - e. Organizational Chart
4. Organizational History & Experience
  - a. A summary of the organizations experience successfully managing the delivery of similar services, creation of comparable data management platforms, and provision of ongoing support and training.
    - i. Summary should clearly demonstrate the following:
      1. Successful response and resolution to client inquiries
      2. Successfully coordinating planning, maintenance, and enhancements to better serve users
  - b. Demonstrate experience working with housing developers, property managers, cities, housing applicants, and local government staff.
  - c. Experience with cloud-hosted platforms, multi-language user interface development, and web/mobile application solutions.
  - d. Documentation of successful experience in integrating diverse systems (including Microsoft SQL Server, Power BI, SharePoint, Azure, APIs) and migrating data

- between systems without data loss.
- e. Demonstration of proven capability with complex technical systems, Agile development methodologies, and experience with iterative system improvements based on user feedback.
- f. References should demonstrate successful experience working under contract with public agencies
  - i. Provide up to three (3) references
  - ii. References provided should have knowledge about, and direct experience with the Applicant
  - iii. Preferably local governments, housing departments, or similarly situated public agencies
  - iv. Include full contact information, nature and duration of services provided, and a brief description of deliverables achieved.
- 5. Pricing & Budget
  - a. A budget showing the annual cost of service delivery, staffing, and other support including FTE personal, one-time start-up costs, software development, customer support, maintenance, hosting fees, data transfer, materials/supplies, training, licenses, hardware, or other direct or indirect costs.
  - b. A detailed narrative justifying proposed budget items and highlighting opportunities for leveraging County funding with other resources.
  - c. Segmented by project phase as outlined in Timeline in Section IV.
- 6. Narrative & Program Plan
  - a. An overall implementation plan that details the system that will be used to respond to this RFP, the necessary changes (if any) that will be made to this system, and how this system responds to the specific platform functions and desired features outlined in this RFP.
    - i. Program Plan should clearly demonstrate the ability to provide all required functions outlined under Platform Functions in Section IV as well as in reference to all relevant sections of the Scoring Rubric in Section XII. A The submission should be clearly organized by business function as outlined in Section IV: Project Management, Invoicing, Asset Management, System of Record, Analysis and Reporting, Interoperability, and Ongoing Support/ Customer Service
    - ii. Additionally, Program Plan should clearly identify ability to provide any desired functions as identified under Desired Functions in Section IV.
  - b. A plan for providing ongoing support and training, past system launch
  - c. A plan for migration of records from the current system into the proposed replacement.
  - d. Program Plan includes and identifies resources for ongoing system management and support, including timely responses to requests for changes or fixes to the system by County staff.
  - e. Actionable plan and staffing to provide ongoing technical training in multiple formats and languages to users and County staff.
  - f. Program Plan identifies goals and objectives by contract phase as outlined in the Timeline of Section IV.
- 7. Training, Support, and Transition Plan
  - a. Samples or outlines of training materials (manual, videos, remote sessions)



- created for previous clients
  - b. Proposed training schedule for Alameda County staff and other stakeholders.
  - c. Description of how ongoing technical support and user assistance will be provided
- 8. Demo Availability
  - a. Prospective dates for a demo of system or similar system capabilities with a chance for HCD staff to ask questions and confirm the presence of key system features.
- 9. Overall General Submission
  - a. Proposal should be reasonable and feasible, all contract tasks by phase are identified
  - b. Proposal is thorough and comprehensive in scope
- 10. Insurance Documentation
  - a. Signed acknowledgement confirming willingness and capacity to meet or exceed the County's minimum insurance requirements as stated in Appendix A of the RFP.
  - b. Applicant to sign Part B of Appendix C as confirmation of acknowledgement.
- 11. Proof of Alameda County Small Local and Emerging Business (SLEB) status or subcontracting plan (if applicable)
- 12. Evidence of Good Standing
  - a. Verification of good standing status within the State of California, including all necessary licenses, certifications and authorizations
- 13. Sample Work Product/ Portfolio
  - a. Links to copies of relevant case studies or work samples demonstrating prior successful implementations of comparable software platforms, including user interface design, custom reporting solutions, and responsive web application development.

#### **D. Frequently Asked Questions (FAQs)**

FAQs will be posted publicly after the initial Mandatory Bidders Conference and revised as needed after subsequent conferences. Applicants must email all questions regarding the RFP and/or application process to [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org). HCD will respond to all questions in a consolidated Frequently Asked Question (FAQ) document that will be sent on Wednesday May 9, 2025 only to those organizations that participated in the Mandatory Virtual Bidders' Conference. This FAQ will reflect questions received via email and discussed during the Conference.

All contact during the RFP process and evaluation phase shall only be through the designated email for the RFP at [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org). Applicants shall neither contact nor lobby County staff or evaluators during the evaluation process. Attempts by the applicant to contact and/or influence application evaluators may result in disqualification of the applicant.

#### **E. Revisions to RFP**

If it becomes necessary to modify any aspect of this RFP, HCD will provide an addendum to each organization attending a Mandatory Bidders' Conference.



## **F. Modifications to Submittals**

Applicants may not modify their Submittal at any time after the due date, except in direct response to a request from HCD for clarification. Any Submittal and proposed information items must be valid for at least 180 days after submission.

## **G. Expense of Preparation**

HCD is not responsible for any expense incurred in preparation of submittals or in any action in connection with the process, or for the costs of any services performed in connection with submittal, interviews, or approval process.

## **H. Reservation of Rights**

HCD reserves the right to conduct any investigation of the qualifications of any proposer that it deems appropriate, negotiate modifications to any of the items submitted, request additional information from any proposer, extend the deadline, reject any or all submittals, and waive any irregularities. HCD retains the right to negotiate the terms and services in any submittal. HCD retains the right to cancel this process, extend the deadline, re-start the process or not select any provider.

## **I. Review and Funding Process**

Subsequent to the Application due date, Applications will be reviewed by HCD for completeness and attainment of basic threshold requirements, and competitiveness. Part of the review panel will include applicant tech demos and review panel Q&A. Applicants will be expected to present the capabilities of their platform demonstrating it meets all requirements of HCD.

*Please note:*

- Incomplete applications will not be accepted.
- Staff may ask clarifying questions of applicants after the Application due date and require submittal of additional documentation or responses to questions. Staff will include this information as part of the review process.
- Proposals that do not meet the basic thresholds may be rejected, may not be rated or ranked, and may not be considered for a funding award, at the Housing Director's sole discretion.
- HCD reserves the right to refuse funding for any and all applications, at the Housing Director's sole direction.

## **J. Evaluation Process**

To be considered for funding, applications will first be evaluated on the basis of whether they have met the **basic thresholds** as outlined in Section XII. Qualified proposals that have passed the basic thresholds will then be scored (rated) based on the evaluation criteria (the “**evaluation criteria**”) as set forth in Section XII. of this RFP.

A County Evaluation Committee (CEC) will individually review evaluate and score rank the projects. The CEC will meet initially in May and as needed thereafter to review proposals, assign scores, and make final funding recommendations to HCD.

HCD reserves the right to:

1. Withdraw this solicitation at any time without prior notice and, furthermore, makes no representation that any contract will occur and that funds will be awarded to any respondent to this solicitation;
2. Waive any irregularities in the RFP process and to reject any and all submissions not in the best interest of Alameda County;
3. Request additional information and material;
4. Fund any application at any amount in order to further Alameda County's goals and objectives on housing issues; and
5. Retain all submitted applications.

Selection or rejection of an application does not affect these rights.

At the conclusion of the RFP response evaluation process, all applicants will be notified by email of the contract award recommendation(s), if any, by HCD. The document providing this notification is called the **Notice of Recommendation to Award/Not Award**. The Notice of Recommendation to Award/Not Award will provide the name of the applicant being recommended for contract award, if any, and the names of all other parties that submitted applications.

## **VI. Protests/Appeals Process**

HCD will abide by the following appeals policy. For the purposes of this section, applicants will be referred to as 'proposers', appeals will be referred to as 'protests' and applicants who have submitted appeals will be referred to as 'protestors'.

- A. HCD prides itself on the establishment of fair and competitive contracting procedures and the commitment made to follow those procedures. The following is provided in the event that proposers wish to protest the selection process or appeal the recommendation to award a contract once the Notices of Intent to Award/Non-Award have been issued. Protests submitted prior to issuance of the Notices of Intent to Award/Non-Award will not be accepted by the County.

1. A protest of the award notice by a proposer must be submitted in hard copy to Michelle Starratt, HCD Director, 224 W. Winton Avenue, Room 108, Hayward CA 94544 or by email to [HCDRFP@acgov.org](mailto:HCDRFP@acgov.org) **before 5:00 p.m. of the FIFTH (5th) business day following the date of issuance of the Notice of Intent to Award by email, NOT the date received by the Bidder of a hard copy mailed through the US postal service.** A protest received after 5:00 p.m. is considered received as of the next business day.
2. Protests must be based on threshold determination, or the points awarded to the protestor's application under the evaluation criteria. Protests may not be based on subjective criteria.

- B. The protest must contain a complete statement of the basis for the protest, including the rationale and underlying facts supporting the protest.
- C. The protest must refer to the specific portions of all documents that form the basis for the protest.
- D. The protest must include the name, address, email address, fax number and telephone number of the person representing the protestor, which will be used for communicating about the protest with the protestor regarding the protest.
- E. HCD will transmit a copy of the protest to all proposers as soon as possible after receipt of the protest.
- F. Upon receipt of written protest, the HCD Director, or designee will review and evaluate the protest and issue a written decision. The HCD Director may, at her discretion, investigate the appeal, obtain additional information, and provide an opportunity to settle the protest by mutual agreement and/or schedule a meeting with the protesting proposer and others, as appropriate, to discuss the protest.
  - 1. The decision on the protest will be issued at least ten (10) business days prior to the first County Committee scheduled to hear recommendations. If additional levels of protest are received, the anticipated meeting date at which the recommendations will be heard may be altered.
  - 2. The decision will be issued by e-mail and U.S. Postal Service to the protestor and will inform the protestor whether the recommendation to the Board of Supervisors in the Notice of Intent to Award is going to change. A copy of the decision will be furnished to all proposers affected by the decision. As used in this paragraph, a proposer is affected by the decision of a protest if a decision on the protest could have resulted in a change in the recommendation in regard to their application.
- G. The decision of the HCD Director on the protest may be appealed to the County's GSA—Office of Acquisition Policy, ATTN: Contract Compliance Officer, located at 1401 Lakeside Drive, 10th Floor, Oakland, CA 94612, Fax: (510) 208-9720, before 5:00 p.m. of the FIFTH (5th) business day following the date the decision is communicated by the HCD Director (not the date the communication is received by the protestor). A protest received after 5:00 p.m. is considered received as of the next business day. A protest received after the FIFTH (5TH) business day following the date of issuance of the decision by the HCD Director shall not be considered under any circumstances by the GSA.
  - 1. In reviewing protest appeals, GSA will not re-judge the proposal(s). The protest to the OCCR shall be limited to review of the procurement process to determine if the contracting department (HCD) materially erred in following the RFP or, where appropriate, County contracting policies or other laws and regulations.

2. The protest must contain a complete statement of the reasons and facts for the protest.
  3. The protest must refer to the specific portions of all documents that form the basis for the protest.
  4. The protest must include the name, address, e-mail address, fax number and telephone number of the person representing the protesting party.
  5. The County Agency/Department will notify all protestors of the protest as soon as possible.
- H. Upon receipt of written protest, GSA–Office of Acquisition Policy, or designee will review and evaluate the protest and issue a written decision. The GSA–Office of Acquisition Policy, may, at its discretion, investigate the protest, obtain additional information, provide an opportunity to settle the protest by mutual agreement, and/or schedule a meeting(s) with the protestor and others (as appropriate) to discuss the protest. The decision on the protest will be issued at least ten (10) business days prior to the first County Committee scheduled to hear recommendations. If additional levels of protest are received, the anticipated meeting date at which the recommendations will be heard may be altered. The decision will be communicated by e-mail, fax, or US Postal Service mail, and will inform the protestor whether or not the recommendation to the Board of Supervisors or GSA in the Notice of Intent to Award is going to change. A copy of the decision will be furnished to all Bidders affected by the decision. As used in this paragraph, a Bidder is affected by the decision on a protest if a decision on the protest could have resulted in the Bidder not being the apparent successful Bidder on the RFP.
- I. The decision of the GSA–Office of Acquisition Policy on the protest may be appealed to the Auditor- Controller’s Office of Contract Compliance & Reporting (OCCR) located at 1221 Oak St., Room 249, Oakland, CA 94612, Fax: (510) 272-6502 unless the OCCR determines that it has a conflict of interest in which case an alternate will be identified to hear the protest and all steps to be taken by OCCR will be performed by the alternate. The protestor whose Bid is the subject of the protest and all Bidders affected by the GSA–Office of Acquisition Policy’s decision on the protest have the right to appeal if not satisfied with the GSA–Office of Acquisition Policy’s decision. All protests to the Auditor-Controller’s OCCR shall be in writing and submitted within five (5) business days following the issuance of the decision by the GSA-Office of Acquisition Policy, not the date received by the protestor. A protest received after 5:00 p.m. is considered received as of the next business day. A protest received after the FIFTH (5TH) business day following the date of issuance of the decision by the GSA Office of Acquisition Policy shall not be considered under any circumstances by the GSA or the Auditor-Controller OCCR.
1. In reviewing protest appeals, the OCCR will not re-judge the proposal(s). The protest to the OCCR shall be limited to review of the procurement process to determine if the contracting department materially erred in following the Bid

or, where appropriate, County contracting policies or other laws and regulations.

2. The protest shall specify the decision being appealed and all the facts and circumstances relied upon in support of the protest.
3. The protest to the OCCR also shall be limited to the grounds raised in the original protest and the decision by the GSA-Office of Acquisition Policy. As such, a protestor is prohibited from stating new grounds for a protest in its protest. The Auditor-Controller (OCCR) shall only review the materials presented to, the process of and conclusions reached by the GSA-Office of Acquisition Policy or department designee and will determine whether to uphold or overturn the protest decision.
4. The Auditor's Office may overturn the results of a bid process for ethical violations by Procurement staff, County Selection Committee members, subject matter experts, or any other County staff managing or participating in the competitive bid process, regardless of timing or the contents of a bid protest.
5. The decision of the Auditor-Controller's OCCR is the final step of the appeal process. A copy of the decision of the Auditor Controller's OCCR will be furnished to the protestor, the Bidder whose Bid is the subject of the Bid protest, and all Bidders affected by the decision.
6. The County will complete the Bid protest/appeal procedures set forth in this paragraph before a recommendation to award the Contract is considered by the Board of Supervisors.
7. The procedures and time limits set forth in this paragraph are mandatory and are each Bidder's sole and exclusive remedy in the event of Bid Protest. A Bidder's failure to timely complete both the Bid protest and appeal procedures shall be deemed a failure to exhaust administrative remedies. Failure to exhaust administrative remedies, or failure to comply otherwise with these procedures, shall constitute a waiver of any right to further pursue the Bid protest, including filing a Government Code Claim or legal proceedings.

## **VII. Basic (Minimum) Thresholds and Evaluation Criteria**

Applications submitted in response to this RFP will be assessed against **basic thresholds** and **evaluation criteria** in order to evaluate, rate and rank these applications. Applications will first be reviewed by HCD staff to determine if the basic thresholds are satisfied. Proposals must meet all threshold requirements in order to be considered for funding.

The team of applicants must jointly meet **the following minimum qualifications** to be considered for the contract:

1. Proposal provides each Platform Function listed in the RFP

2. Have capacity to serve in the System Administrator role, coordinate with HCD staff, and meet communication and reporting requirements as required by the Scope of Services.
3. Be regularly and continuously engaged in the business of providing affordable housing information or similar services in alignment with those identified in the Scope of Services in the Bay Area, ideally within Alameda County. Successful applicants will have a proven track record.
4. Possess familiarity with affordable housing development and asset management
5. Have demonstrated experience and success undertaking a data-driven approach, decision-making based on large quantity of data, user feedback, and analytics analysis.
6. Have demonstrated experience creating modern, user-friendly sites with visual brand identity that accounts for: required processes and features, accessibility, and multi-lingual needs.
7. Have demonstrated experience with Agile development processes including performing discovery, including end-user and stakeholder research, and translating it into user stories.

#### A. Rating and Ranking Evaluation Criteria

Points will be awarded on a sliding scale. The County reserves the right to assign points in a range between the numerical points shown in this table. A threshold of 80 points will be necessary to be awarded a contract through this RFP.

Criteria	Total Points Available
<b>Applicant Experience &amp; Proposal Completion</b>	
<b>Experience with effective program management of public programs and services</b>	<b>10 points</b>
Applicant has experience successfully working with up to three at least two non-profit organizations, cities, local government clients and implementing a software solution (up to 3) Applicant has demonstrated experience working with best-in-class and emergent technology platforms and companies to provide procurement (1) program management (1) and public services outputs reporting (1) solutions.	
Applicant has demonstrated capacity for managing intersection multiple workstreams and subject areas (e.g. knowledgeable and engaged staff, project management software, administrative process, statutory compliance).(up to 2)	

Applicant has demonstrated measurable success engaging with multiple types of users with different perspectives and needs (e.g., vendors, system owners, coordinators, finance, analysts) (up to 2).	
<b>Experience with providing technical coordination, development, and support</b>	<b>10 points</b>
Applicant has demonstrated experience successfully responding to and resolving email inquiries and phone calls from clients in a timely manner (up to 3)	
Applicant has experience successfully coordinating with technology vendors on system planning, maintenance, and enhancements to better serve users. (up to 4)	
Applicant has experience developing and providing effective technical training materials in multiple formats and languages (manuals, video, remote training, etc.) to program managers as necessary. (up to 3)	
<b>Proposed System designed for continuous improvement</b>	<b>10 points</b>
Demonstrated examples from a successful project showing the ability to incorporate feedback into improved program implementation. (One complex solutions 3) (plus one quickly implemented 2)	
Demonstrated examples to progressively integration new features, functions, and applications into a solution (one complex solutions 3) (plus one quickly implemented 2)	
<b>Experience with cloud-hosted website development, maintenance, and support</b>	<b>30 points</b>
Applicant has experience working with Agile development processes, including daily scrums and iterative development/feedback cycles. (2)	
Applicant has experience performing discovery, including end-user and stakeholder research. (1)	
Applicant has experience creating modern, user-friendly sites with visual brand identity that accounts for required processes and features, accessibility. (5)	
Applicant has experience working with complex information (introductory, instructional, navigation, legislative, form completion, help text, etc.) and functionality (forms and form submission, step-by-step processes, secure account creation and maintenance, custom tools, various methods of communication to users regarding real-time status, context-based responses, etc.). (10)	
Applicant has experience working with clients and stakeholders to extract unsaid requirement details (i.e., by asking questions different ways, using various scenarios, talking with stakeholders that represent different system roles). (2)	
Applicant has experience with communicating and working with multiple stakeholders at varying levels of technical comfort and expertise (including those with very low technical knowledge and vocabulary). (5)	



Applicant has experience working with public programs and designing reporting templates to match reporting elements required by public funders. (5)	
Applicant has experience designing complex websites that include both front-end and back-end and development. (5)	
Applicant has experience integrating federated sources of data collection (5)	
<b>Business in Alameda County; Experience working with Contractors and SLEB firms</b>	<b>10 points</b>
Applicant is an Alameda County certified SLEB or will include a SLEB sub-contractor in its program (5)	<b>22 points</b>
Applicant organization is based in Alameda County (5)	
<b>Quality of Program Plan, Budget, and Schedule, and responsiveness to Scope of Services</b>	
The Program Plan narrative demonstrates a clear understanding of the Scope of Services and addresses all required components. (12)	
The Program Plan identifies goals and objectives by contract phase. (3)	
The provided Schedule seems reasonable and feasible, and all contract tasks by phase are identified. (3)	
Application/Submittal is thorough and comprehensive in scope. (2)	
The Applicant has submitted all required information in a clear, understandable manner. (2)	<b>5 points</b>
<b>Personnel Plan and Capacity</b>	
Applicant has a track record of success in hiring and retaining staff. (2)	
Personnel Plan demonstrates qualifications and capacity to undertake the Program in January 2026. (3)	<b>3 points</b>
<b>Quality of references submitted</b>	
Applicant demonstrates successful experience working under contract with public agencies. (1)	
References provided have knowledge about, and direct experience with, the Applicant. (1)	
Quality and relevance of references. (1)	<b>7 points</b>
<b>Product Demo</b>	
Demonstration that product is easy to use for staff and other stakeholders, navigable, intuitive, and generally seems to be able to fulfill the needs of the relevant staff teams (up to 7)	
<b>Proposal Features</b>	
<b>Project Management</b>	<b>5 Points Total</b>
Standardized dynamic project budget tracking for application	<b>2</b>



Templatization and automation of notices and agreements	<b>2</b>
User interfaces optimized and permissioned based on roles	<b>1 point for any additional features in this section</b>
Automated features to confirm accuracy of project information compared to HCD requirements as outlined in RFPs, regulatory agreements, policies, guidelines, etc.	
Longitudinal tracking of project changes from application through construction	
Autosave abilities for applicant information	
Ability to combine all application related documents to prepare review packets that can be saved and/ or printed	
Allow for third party upload of budgets, project plans, photos, contracts, receipts, and other relevant documents from contractors, organizations, and companies in contract with HCD or applying for funding from HCD	
<b>Invoicing</b>	<b>5 Points Total</b>
Allow developers to create and submit invoices easily for processing and fulfillment by HCD staff.	<b>2</b>
Updates, invoices, and payments should integrate with Financial database	<b>2</b>
Developers should have the ability to upload, revise and remove supporting backup documentation.	<b>1 point for any additional features in this section</b>
Allow financial and loan information related to projects and programs to be utilized by other staff and departments	
Identify incorrect information and create barriers or popups to ensure missing or incorrect information is added	
Conditional logic; the system should control what can be entered into certain fields Support for progressive automation of routine invoicing for monitoring and other asset management fees	
<b>Asset Management</b>	<b>5 Points Total</b>
Annual tracking of budgets vs actual in support of operating subsidy.	<b>2</b>
Standardized dynamic project budget tracking for operation	<b>2</b>
Enable Templatization and automation of notices	<b>1 point for any additional features in this section</b>
Initiate automatic warnings or messages for action items, e.g., expiring insurance	
Allow generating of compliance letters drawing from multiple sources	
Allow drafting and tracking of edits of findings and reports	
Track debt service	
Track longitudinal information about assets i.e.: Transaction reports, status changes	
Allow visibility into co-funders data	
<b>System of Record</b>	<b>5 Points Total</b>
Records are searchable, sortable, filterable, and otherwise easy to manipulate	<b>2</b>

Easy customization of reports using most or all fields, report request reflect the current state and fields in the system	2
Records are easily viewable in one readable dashboard	1 point for any additional features in this section
Plain language report creation	
<b>Analysis and Reporting</b>	<b>5 Points Total</b>
Create, display, utilize, archive and print project related documents including budgets, contracts, and service plans.	2
Support scheduled and on-demand reporting in widely used formats, especially MS Excel and templated PDF.	2
Structure data using method which can support complex analysis and allow integration with data analysis software	1 point for any additional features in this section
Allow the specific filter or analysis of projects by type, size, funding source, location, population served, or other metrics required by HCD staff	
<b>Interoperability</b>	<b>5 Points Total</b>
System should include, to the greatest extent practicable and at the discretion of HCD staff all current data fields that are utilized by CDS users.	2
System should demonstrate potential to dynamically link project information with other project funders or jurisdictions who share the platform in a federated or similar structure, and allow features to be turned on or off depending on a jurisdiction's needs	2
links with: Microsoft SQL, Server, Power BI, SharePoint, Azure, Publicly Accessible Apis, Elation, and others	1 point for any additional features in this section
Expands Housing Quality Inspection platform to include HQS and NSPIRE	
<b>Ongoing Support/Customer Service</b>	<b>5 Points Total</b>
Integrated support request and fix ticket tracking system	2
System support staff can reply to bugs and fixes within a reasonable and consistent timeframe	2
New features are tested in advance and routinely integrated based on industry best-practices	1 point for any additional features in this section
UI and other features tested with users and amended based on feedback	
Training materials regularly updated and available for both HCD Staff and other users	
<b>Total</b>	<b>142</b>

Additional Points will be awarded based on the Alameda County Small Local and Emerging Business (SLEB) status as described in **Appendix D** attached to this RFP. Reviewers will individually score the project proposals and rate them on the degree to which they meet the respective evaluation rating and ranking criteria. The scores will then be averaged to come up

with the final score for each proposal. The proposals which meet threshold obligations and score at least 80 points will be eligible for an award, subject to funding availability, scoring relative to other proposals under consideration, and BoS approval.

### **B. Required Application Materials**

Applicants are required to submit all required documentation and materials as outlined in Section X.C. Application Organization and Required Application Materials as well as Appendix C Part E.

## **VIII. List of Appendices**

Appendix A – Alameda County Insurance Requirements

Appendix B – Proposal Features Worksheet

Appendix C – Application Submittal Packet

Appendix D – SLEB Information Sheet

## Appendix A – Alameda County Minimum Insurance Requirements

### COUNTY OF ALAMEDA MINIMUM INSURANCE REQUIREMENTS

Without limiting any other obligation or liability under this Agreement, the Contractor, at its sole cost and expense, shall secure and keep in force during the entire term of the Agreement or longer, as may be specified below, the following minimum insurance coverage, limits and endorsements. The County reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances. If the contractor maintains broader coverage and/or higher limits than the minimums shown below, the County requires and shall be entitled to the broader coverage and/or the higher limits maintained by the Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the County.

TYPE OF INSURANCE COVERAGES	MINIMUM LIMITS
<b>A Commercial General Liability</b> Premises Liability; Products and Completed Operations; Contractual Liability; Personal Injury and Advertising Liability	\$1,000,000 per occurrence (CSL) Bodily Injury and Property Damage
<b>B Commercial or Business Automobile Liability</b> All owned vehicles hired or leased vehicles, non-owned, borrowed and permissive uses. Personal Automobile Liability when extended to cover your business is acceptable for individual contractors with no transportation or hauling related activities	\$1,000,000 per occurrence (CSL) Any Auto or Hired and Non-Owned Autos Bodily Injury and Property Damage
<b>C Workers' Compensation (WC) and Employers Liability (EL)</b> As required by State of California	WC: Statutory Limits EL: No less than \$1,000,000 per accident for bodily injury or disease
<b>D Technology Professional Liability (Errors and Omissions)</b> Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Vendor in this agreement and shall include, but not be limited to, claims involving media liability and infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, security and privacy liability that include invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.	\$2,000,000 per occurrence \$2,000,000 project aggregate
<b>E Endorsements and Conditions:</b> <ol style="list-style-type: none"> <li><b>1. ADDITIONAL INSURED:</b> County of Alameda, its Board of Supervisors, the individual members thereof, and all County officers, agents, employees, volunteers, and representatives are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used). Auto policy shall contain or be endorsed to contain additional insured coverage for the County.</li> <li><b>2. DURATION OF COVERAGE:</b> All required insurance shall be maintained during the entire term of the Agreement. In addition, Insurance policies and coverage(s) written on a claims-made basis shall be maintained and evidence of insurance must be provided during the entire term of the Agreement and for at least five (5) years following the later of termination of the Agreement and acceptance of all work provided under the Agreement, with the retroactive date of said insurance (as may be applicable) concurrent with the commencement of activities pursuant to this Agreement. If coverage is cancelled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Contractor must purchase "extended reporting" coverage for a minimum of five (5) years after completion of work.</li> <li><b>3. REDUCTION OR LIMIT OF OBLIGATION:</b> All insurance policies, including excess and umbrella insurance policies, shall be primary and non-contributory coverage at least as broad as ISO CG 20 10 04 13 as respects the County, its officers, officials, employees, or volunteers. Any insurance or self-insurance maintained by the County, its officers, officials, employees, or volunteers shall be excess of the Contractor's insurance and shall not contribute with it. Pursuant to the provisions of this Agreement insurance effected or procured by the Contractor shall not reduce or limit Contractor's contractual obligation to indemnify and defend the Indemnified Parties.</li> <li><b>4. INSURER FINANCIAL RATING:</b> Insurance shall be maintained through an insurer with an A.M. Best Rating of no less than A: VII or equivalent, shall be admitted to the State of California unless otherwise acceptable by Risk Management, and with deductible amounts acceptable to the County. Acceptance of Contractor's insurance by County shall not relieve or decrease the liability of Contractor hereunder. Self-insured retentions must be declared and approved. Any deductible or self-insured retention amount or other similar obligation under the policies shall be the sole responsibility of the Contractor. The policy language shall provide or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or County.</li> </ol> <p><b>SUBCONTRACTORS:</b> Contractor shall include all subcontractors as an insured (covered party) under its policies or shall verify that the subcontractor, under its own policies and endorsements, has complied with the insurance requirements in this Agreement, including this Exhibit.</p> <ol style="list-style-type: none"> <li><b>5. JOINT VENTURES:</b> If Contractor is an association, partnership or other joint business venture, required insurance shall be provided by one of the following methods: <ul style="list-style-type: none"> <li>• Separate insurance policies issued for each individual entity, with each entity included as a "Named Insured" (covered party), or at minimum named as an "Additional Insured" on the other's policies. Coverage shall be at least as broad as in the ISO Forms named above.</li> </ul> </li> </ol>	

	<ul style="list-style-type: none"> <li>Joint insurance program with the association, partnership or other joint business venture included as a "Named Insured".</li> </ul> <p>6. <b>CANCELLATION OF INSURANCE:</b> Each insurance policy required above shall provide that coverage shall not be cancelled, except with notice of cancellation provided to the County in accordance with policy terms and conditions.</p> <p>7. <b>CERTIFICATE OF INSURANCE:</b> Before commencing operations under this Agreement, Contractor shall provide Certificate(s) of insurance and applicable insurance endorsements as set forth in the provisions of this Agreement and this Exhibit C, in forms satisfactory to County, evidencing that all required insurance coverage is in effect. However, failure to obtain the required documents prior to the work beginning shall not waive the Contractor's obligation to provide them. The County reserves the right to require the Contractor to provide complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.</p>
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(Rev. 03/31/20)

## Appendix B – Proposal Features Worksheet

Applicants should fill out the following worksheet attesting to their systems' features. Presence of a major desired features should be awarded 2 points each, while presence of any additional desired features should be awarded 1 point total NOT 1 point each.

<b>Proposal Features</b>	<b>Points Available</b>	<b>Applicant Self-Score</b>
<b>Project Management</b>	<b>5 Points Total</b>	
Standardized dynamic project budget tracking for application	<b>2</b>	
Templatization and automation of notices and agreements	<b>2</b>	
User interfaces optimized and permissioned based on roles	<b>1 point for any additional features in this section</b>	
Automated features to confirm accuracy of project information compared to HCD requirements as outlined in RFPs, regulatory agreements, policies, guidelines, etc.		
Longitudinal tracking of project changes from application through construction		
Autosave abilities for applicant information		
Ability to combine all application related documents to prepare review packets that can be saved and/ or printed		
Allow for third party upload of budgets, project plans, photos, contracts, receipts, and other relevant documents from contractors, organizations, and companies in contract with HCD or applying for funding from HCD		
<b>Invoicing</b>	<b>5 Points Total</b>	
Allow developers to create and submit invoices easily for processing and fulfillment by HCD staff.	<b>2</b>	
Updates, invoices, and payments should integrate with Financial database	<b>2</b>	
Developers should have the ability to upload, revise and remove supporting backup documentation.	<b>1 point for any additional features in this section</b>	
Allow financial and loan information related to projects and programs to be utilized by other staff and departments		
Identify incorrect information and create barriers or popups to ensure missing or incorrect information is added		
Conditional logic; the system should control what can be entered into certain fields Support for progressive automation of routine invoicing for monitoring and other asset management fees		
<b>Asset Management</b>	<b>5 Points Total</b>	
Annual tracking of budgets vs actual in support of operating subsidy.	<b>2</b>	

Standardized dynamic project budget tracking for operation	2	
Enable Templatization and automation of notices	<b>1 point for any additional features in this section</b>	
Initiate automatic warnings or messages for action items, e.g., expiring insurance		
Allow generating of compliance letters drawing from multiple sources		
Allow drafting and tracking of edits of findings and reports		
Track debt service		
Track longitudinal information about assets i.e.: Transaction reports, status changes		
Allow visibility into co-funders data		
<b>System of Record</b>	<b>5 Points Total</b>	
Records are searchable, sortable, filterable, and otherwise easy to manipulate	2	
Easy customization of reports using most or all fields, report request reflect the current state and fields in the system	2	
Records are easily viewable in one readable dashboard	<b>1 point for any additional features in this section</b>	
Plain language report creation		
<b>Analysis and Reporting</b>	<b>5 Points Total</b>	
Create, display, utilize, archive and print project related documents including budgets, contracts, and service plans.	2	
Support scheduled and on-demand reporting in widely used formats, especially MS Excel and templated PDF.	2	
Structure data using method which can support complex analysis and allow integration with data analysis software	<b>1 point for any additional features in this section</b>	
Allow the specific filter or analysis of projects by type, size, funding source, location, population served, or other metrics required by HCD staff		
<b>Interoperability</b>	<b>5 Points Total</b>	
System should include, to the greatest extent practicable and at the discretion of HCD staff all current data fields that are utilized by CDS users.	2	
System should demonstrate potential to dynamically link project information with other project funders or jurisdictions who share the platform in a federated or similar structure, and allow features to be turned on or off depending on a jurisdiction's needs	2	
links with: Microsoft SQL, Server, Power BI, SharePoint, Azure, Publicly Accessible Apis, Elation, and others	<b>1 point for any additional features</b>	

Expands Housing Quality Inspection platform to include HQS and NSPIRE	<b>in this section</b>	
<b>Ongoing Support/Customer Service</b>	<b>5 Points Total</b>	
Integrated support request and fix ticket tracking system	<b>2</b>	
System support staff can reply to bugs and fixes within a reasonable and consistent timeframe	<b>2</b>	
New features are tested in advance and routinely integrated based on industry best-practices	<b>1 point for any additional features in this section</b>	
UI and other features tested with users and amended based on feedback		
Training materials regularly updated and available for both HCD Staff and other users		
<b>Total Self-Score</b>	<b>35</b>	



### **Appendix C – Application Submittal Packet**

**INSTRUCTIONS:** Complete and submit all pages of this Exhibit electronically in PDF form, including Part A (Organization Information), Part B (Applicant Information and Acceptance), Part C (Exceptions, Clarifications, Amendments), and Part D (Professional References). Sign and date this Submittal Addendum and Certifications at the conclusion of Parts A and B. Submit all additional required documentation described at Part E (Required Documentation and Submittals).

- **AS DESCRIBED IN THE INSTRUCTIONS OF THE SUBMITTAL ADDENDUM SECTION OF THIS RFP, APPLICANTS ARE TO SUBMIT ONE (1) ELECTRONIC COPY OF THE SUBMITTAL IN PDF. NO PHYSICAL APPLICATION MATERIALS WILL BE ACCEPTED.**
- **ALL PAGES OF THIS SUBMITTAL ADDENDUM MUST BE SUBMITTED IN TOTAL WITH ALL REQUIRED DOCUMENTS AS PDFS; ALL INFORMATION REQUESTED MUST BE SUPPLIED; ANY PAGES (OR ITEMS THEREIN) NOT APPLICABLE TO THE APPLICANT MUST STILL BE SUBMITTED AS PART OF A COMPLETE APPLICATION RESPONSE, WITH SUCH PAGES OR ITEMS CLEARLY ANNOTATED “N/A”.**
- **APPLICANTS MUST QUOTE PRICE(S) AS SPECIFIED IN THE RFP, INCLUDING ANY ADDENDUMS. ALL PRICES AND NOTATIONS MUST BE PRINTED IN INK OR TYPEWRITTEN; NO ERASURES ARE PERMITTED; ERRORS MAY BE CROSSED OUT AND CORRECTIONS PRINTED IN INK OR TYPEWRITTEN ADJACENT, AND MUST BE INITIALED IN INK BY PERSON SIGNING SUBMITTAL. THESE DOCUMENTS MUST BE SUBMITTED ELECTRONICALLY ONLY.**
- **APPLICANTS THAT DO NOT COMPLY WITH THE REQUIREMENTS, AND/OR SUBMIT INCOMPLETE SUBMITTAL PACKAGES, SHALL BE SUBJECT TO DISQUALIFICATION AND THEIR SUBMITTALS REJECTED IN TOTAL.**
- **IF APPLICANTS ARE MAKING ANY CLARIFICATIONS AND/OR AMENDMENTS, OR TAKING EXCEPTION TO POLICIES OR SPECIFICATIONS OF THIS RFP, INCLUDING THOSE TO THE COUNTY’S SMALL, LOCAL, AND EMERGING BUSINESS PROGRAM (SLEB) POLICY, THESE MUST BE SUBMITTED IN THE EXCEPTIONS, CLARIFICATIONS, AMENDMENTS SECTION OF THIS SUBMITTAL ADDENDUM (PART C) IN ORDER FOR THE SUBMITTAL RESPONSE TO BE CONSIDERED COMPLETE.**
- **FOR ALL DOCUMENTS PREPARED AND SUBMITTED BY THE APPLICANT, THE COUNTY SUGGESTS USING 12-pt CALIBRI, ARIAL, OR TIMES NEW ROMAN FONT, WITH PAGE MARGINS OF AT LEAST ONE INCH**

**PART A: ORGANIZATION INFORMATION**

Official Name of Applicant: \_\_\_\_\_

Street Address Line 1: \_\_\_\_\_

Street Address Line 2: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Webpage: \_\_\_\_\_

Type of Entity / Organizational Structure (check one):

Corporation                      Joint Venture  
Limited Liability Partnership  
Limited Liability Corporation                      Unincorporated Association  
Other: \_\_\_\_\_

Jurisdiction of Organization Structure: \_\_\_\_\_

Date Organization was formed: \_\_\_\_\_

Federal Tax Identification Number: \_\_\_\_\_

Primary Contact Information:

Name / Title: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**SIGNATURE:** \_\_\_\_\_

Name and Title of Authorized Signer: \_\_\_\_\_

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

**PART A1: ORGANIZATION #2 INFORMATION**

Official Name of Applicant: \_\_\_\_\_

Street Address Line 1: \_\_\_\_\_



Street Address Line 2: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Webpage: \_\_\_\_\_

Type of Entity / Organizational Structure (check one):

Corporation                      Joint Venture  
Limited Liability Partnership  
Limited Liability Corporation                      Unincorporated Association  
Other: \_\_\_\_\_

Jurisdiction of Organization Structure: \_\_\_\_\_

Date Organization was formed: \_\_\_\_\_

Federal Tax Identification Number: \_\_\_\_\_

Primary Contact Information:

Name / Title: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**SIGNATURE:** \_\_\_\_\_

Name and Title of Authorized Signer: \_\_\_\_\_

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

**PART B: APPLICANT INFORMATION AND ACCEPTANCE**

To: The County of Alameda

From: \_\_\_\_\_  
(Official Name of Applicant)

1. The undersigned declares that the Application Documents, including, without limitation, the RFP, Addenda, and Exhibits have been read.



2. The undersigned is authorized, offers, and agrees to furnish the articles and/or services specified in accordance with the Specifications, Terms & Conditions of the Application Documents of this RFP.

3. The undersigned has reviewed the Application Documents and fully understands the requirements in this Application process including, but not limited to, the requirements under the County Provisions, and that each Applicant who is awarded a contract shall be, in fact, a prime Contractor, not a subcontractor, to County, and agrees that its Submittal, if accepted by County, will be the basis for the Applicant to begin forming a contract with County in accordance with the intent of the Application Documents.

4. The undersigned acknowledges receipt and acceptance of all addenda.

5. The undersigned agrees to the following terms, conditions, certifications, and requirements found on the County's website:

- **[Debarment / Suspension Policy](#)**

[<http://www.acgov.org/gsa/departments/purchasing/policy/debar.htm>]

- **[Iran Contracting Act \(ICA\) of 2010](#)**

[<http://www.acgov.org/gsa/departments/purchasing/policy/ica.htm>]

- **[General Environmental Requirements](#)**

[<http://www.acgov.org/gsa/departments/purchasing/policy/environ.htm>]

- **[Small, Local & Emerging Business \(SLEB\) Program](#)**

[<http://acgov.org/auditor/sleb/overview.htm>]

- **[First Source](#)**

[<http://acgov.org/auditor/sleb/sourceprogram.htm>]

- **[Online Contract Compliance System](#)**

[<http://acgov.org/auditor/sleb/elation.htm>]

- **[General Requirements](#)**

[<http://www.acgov.org/gsa/departments/purchasing/policy/genreqs.htm>]

- **[Proprietary and Confidential Information](#)**

[<http://www.acgov.org/gsa/departments/purchasing/policy/proprietary.htm>]

6. The undersigned acknowledges that Applicant will be in good standing in the State of California, with all the necessary licenses, permits, certifications, approvals, and authorizations necessary to perform all obligations in connection with this RFP and associated Application Documents.

7. It is the responsibility of each Applicant to be familiar with all of the specifications, terms and conditions and, if applicable, the site condition. By

the submission of a Submittal, the Applicant certifies that if awarded a contract they will make no claim against the County based upon ignorance of conditions or misunderstanding of the specifications.

8. Patent indemnity: Vendors who do business with the County shall hold the County of Alameda, its officers, agents and employees, harmless from liability of a nature or kind, including cost and expenses, for infringement or use of any patent, copyright or other proprietary right, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract or purchase order.

9. **Insurance certificates are not required at the time of submission.** However, by signing this Addendum and Certification, the Contractor agrees to meet the minimum insurance requirements stated in the RFP or make clear in Part C what exceptions they will be seeking. The undersigned acknowledges **ONE** of the following (please check only one box):

- ☐ Applicant is not local to Alameda County and is ineligible for any preference; **OR**
  - ☐ Applicant is a certified Small, Local and Emerging Business (SLEB) under the Alameda County SLEB Program and is requesting a 10% preference; (Applicant must complete the **SLEB INFORMATION SHEET** found as **Exhibit C** to the RFP, check the first box, and provide your SLEB Certification Number and expiration date; **OR**
  - ☐ Applicant is LOCAL to Alameda County, is submitting documentation to determine its SLEB status, and is requesting a 5% preference, and has attached the following documentation to this Submittal Addendum and Certifications:
    - Copy of a verifiable business license, issued by the County of Alameda or a City within the County; and
    - Proof of six (6) months business residency, identifying the name of the Applicant and the local address. Utility bills, deed of trusts or lease agreements etc., are acceptable verification documents to prove business residency.
10. The undersigned hereby certifies the following statements:
1. *That no elected or appointed official or employee of the County is financially interested, directly or indirectly, in the performance of the services specified in the RFP;*
  2. *That the information included in the Submittal is true and correct to the best of its knowledge; and*
  3. *That the person signing the RFP cover letter/transmittal letter is authorized to submit this application on behalf of the Applicant.*

**SIGNATURE:** \_\_\_\_\_



Name and Title of Authorized Signer: \_\_\_\_\_

Dated this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_

**PART C: EXCEPTIONS, CLARIFICATIONS, AMENDMENTS**

**Applicant Name:** \_\_\_\_\_

**Instructions:** List below requests for clarifications, exceptions and amendments, if any, to the RFP and associated Application Documents, including insurance requirements and submit with your Application. The County is under no obligation to accept any exceptions, and such exceptions may be a basis for application disqualification.

Reference to:			Description
Page No.	Section	Item No.	
<b>Example: p. 23</b>	<b>D</b>	<b>1.c.</b>	<b><i>Vendor takes exception to...</i></b>

\*Print additional pages as necessary

**PART D: REFERENCES**

**Applicant Name:** \_\_\_\_\_

**Instructions:** On the following pages are the templates that Applicants must use to provide references. **Applicants are to provide a list of three references.** References must be satisfactory as deemed solely by County as outlined in Section X.C.4.f. Services or goods provided by Applicant to the references should have similar scope, volume and requirements to those outlined in these specifications, terms and conditions.



Applicants must verify that the contact information for all references provided is current and valid. If a reference cannot be contacted it may affect the qualification and scoring of Applicants submission.

Applicants are strongly encouraged to notify all references that the County may be contacting them to obtain a reference.

The County may contact some or all of the references provided in order to determine Applicant's performance record on work similar to that described in this request. The County reserves the right to contact references other than those provided in the Response and to use the information gained from them in the evaluation process.

### **REFERENCES**

#### Alameda County Asset Management Administration Request for Proposals March 2025

**Applicant Name:**

Organization/Agency Name: <input type="text"/>	Contact Person: <input type="text"/>
Address: <input type="text"/>	Telephone Number: <input type="text"/>
City, State, Zip: <input type="text"/>	E-mail Address: <input type="text"/>
Services Provided / Date(s) of Service: <input type="text"/>	

Organization/Agency Name: <input type="text"/>	Contact Person: <input type="text"/>
Address: <input type="text"/>	Telephone Number: <input type="text"/>
City, State, Zip: <input type="text"/>	E-mail Address: <input type="text"/>
Services Provided / Date(s) of Service: <input type="text"/>	

Organization/Agency Name: <input type="text"/>	Contact Person: <input type="text"/>
Address: <input type="text"/>	Telephone Number: <input type="text"/>
City, State, Zip: <input type="text"/>	E-mail Address: <input type="text"/>
Services Provided / Date(s) of Service: <input type="text"/>	

### **Part E - REQUIRED DOCUMENTATION AND SUBMITTALS**



**All of the specific documentation listed below is required to be submitted with the Appendix C – Application Response Packet in order for an application to be deemed complete. All details below should be prepared in alignment with the instructions listed below as well as all detail included in Section X.C. Application Organization. Applicants shall submit all documentation, in the order listed below and clearly label each section with the appropriate title (i.e. Letter of Transmittal, Appendix C – Application Response Packet, Organizational Overview Narrative, etc.).**

1. **Letter of Transmittal:** Provide a narrative letter (2 pages maximum) of the applicant’s relevant experience and qualifications, approach in providing its services to the County, summary proposed staffing/personnel plan, brief description of the program plan and response to the Scope of Services, and summary of proposed budget. The Letter of Transmittal should also indicate the applicant’s capacity and willingness to serve in the role of System Administrator. The letter of transmittal must be signed by the Principal, Executive Director or Chief Executive Officer of the submitting applicant entity. Electronic signatures are acceptable.
2. **Appendix C – Application Response Packet:** Every applicant must fill out and submit the complete Appendix C– Application Response Packet – including all completed Parts (Part A-Organization Information; Part B- Application Information and Acceptance; Part C-Exceptions, Clarifications, Amendments; and Part D-References.

**IMPORTANT NOTES ON Appendix C:**

Every Applicant must submit Appendix C in its entirety including signing all required pages.

Applicants must use the References templates found on Part D of this Appendix C – Application Response Packet to provide references.

Applicants are to provide a list of three (3) references. References must be satisfactory as deemed solely by County as outlined in Section X.C.4.f. References should be able to speak to the applicant’s success in working in contract with public agencies on housing program implementation.

Exceptions, Clarifications, Amendments must list exceptions, clarifications, and amendments, if any, to the RFP and associated Application Documents, including insurance requirements, and must be submitted with your application using the template on Part C of this Appendix C – Application Response Packet.

**THE COUNTY IS UNDER NO OBLIGATION TO ACCEPT ANY EXCEPTIONS, AND SUCH EXCEPTIONS MAY BE A BASIS FOR APPLICATION DISQUALIFICATION.**



3. **Organizational Background, Experience and Capacity, and Personnel Plan:** Applicant should provide documentation to demonstrate relevant experience and capacity to serve as the System Administrator, and evidence of connections to residential general contractors working in Alameda County, including small/local contracting businesses. Provide the following documentation with the application:
- a. Organization Overview Narrative (maximum 1 page); Provide a narrative overview (1 page maximum) of the organization proposing to serve as the System Administrator. Include the full legal name and a summary of the structure and management of the organization. Describe any significant changes, including the management and/or structure of your organization, that have occurred during the past three years. List the location of your firm's main office and the locations of any office(s) within Alameda County. Indicate whether organization is certified through the Small, Local and Emerging Business Program (SLEB) in Alameda County, and if not, proposed subcontractors who meet the SLEB criteria.
  - b. List of Board Members and affiliations (required for nonprofits and corporations)
  - c. Organizational Chart
  - d. Personnel Plan Narrative – list of key personnel associated with program implementation, including job title, years of related experience, education, certifications, etc. and role that person will play in connection with program implementation. Provide a narrative (1 page maximum) that describes the proposed personnel plan for System implementation.
  - e. SLEB Partnering Information Sheet. Complete the SLEB Partnering Information Sheet found at Appendix D to the RFP. If Bidder is a Small, Local, and Emerging Business pursuant to Alameda County's Small, Local, and Emerging Business (SLEB) Program (see <http://acgov.org/auditor/sleb/overview.htm>), please check the appropriate boxes at Part B.9 of the **Submittal Addendum and Certifications**.

4. **Program Plan Narrative Statement:** The Applicant's proposed Program Plan narrative is a significant component of the Application and carries significant weight in the County's evaluation of proposals. Provide a comprehensive and detailed narrative description (not to exceed 5 pages) of how your organization would implement the Scope of Services anticipated by this RFP. Program Plan Narrative should respond to the prompts below at a minimum:

- Explain in detail your organization’s proposed Program Plan to fulfill the items specified in the Scope of Services by phase (Kickoff Phase and Implementation Phase).
- Describe your organization’s relevant experience in with effective program management of affordable housing programs and services.
- Describe your organization’s experience with providing technical coordination support to low-income affordable housing applicants.
- Describe your organization’s experience with data-driven strategic decision-making in affordable housing program management and implementation.
- Describe your organization’s connections and relationships with local contractors working in Alameda County and/or the East Bay.
- Discuss any innovative approaches that your organization would employ in the role of System Administrator.
- Describe your organization’s experience with cloud-hosted website development, maintenance, and support.
- Include any other information that your organization may find relevant to the County’s review of your application.

5. **Schedule:** Provide a detailed schedule to accompany the proposed Program Plan that separates out milestones and tasks by contract phase. Schedule should show ability to start providing services by July 2025, make required functions fully testable by January 2026 at the latest, and fully operational, with staff trained, by June 30, 2026. Include a short narrative statement to discuss any issues or difficulties with meeting this timeline.
6. **Program Budget and Budget Narrative.** Submit a detailed budget with application, showing the proposed budget by phase, and period of time covered by that portion of the budget. Budget should address all program costs anticipated in the Scope of Services (refer to Scope of Services) and any other costs that Bidder believes necessary for successful program implementation, including, but not necessarily limited to, marketing and outreach costs, personnel, fringe benefits, direct and indirect costs, and any requested cash advance funding for program ramp-up. Provide estimated costs for any subcontracted services and percentage of these services to overall proposed budget amount. In addition to the above general program budget, provide an estimated “per household” cost for provision of comprehensive technical assistance with detailed line itemization of related costs. Provide a budget narrative description to

accompany the submitted Program Budget (1-page maximum). Discuss opportunities for leveraging the County's funding for the contract and if applicable, possible resources/funding sources that your organization may be able to access to augment the overall program budget.

7. **Writing Samples.** Provide examples of relevant materials developed by your organization in the implementation of affordable housing programs and services, including outreach and on-boarding materials, project management tools, website forms and tools, etc.

## Appendix D – SLEB Information Sheet

Instructions: On the following page is the SLEB Information Sheet. Every Bidder must complete and submit a signed SLEB Information Sheet indicating their SLEB certification status. If the Bidder is not certified, the information sheet must be completed with the name, identification information, and goods/services to be provided by the CERTIFIED SLEB partner(s) with whom the Bidder will subcontract to meet the County SLEB participation requirement. The Exhibit must be signed by EACH of the named CERTIFIED SLEB(s) that will be subcontractors.

If a bidder is unable to meet the SLEB requirements, they must take exception to this requirement in the Exceptions and Clarifications section of this solicitation. Please note that the County is under no obligation to accept any exceptions or clarifications, and any exceptions or clarifications may be the basis for bid disqualification. SLEB certification must be valid at the time of bid response submittal for SLEB primes and SLEB subcontractor(s).

- For SLEB Subcontracting Questions: Please contact the General Services Agency - Office of Acquisition Policy, [GSA.OAP@acgov.org](mailto:GSA.OAP@acgov.org).
- For questions/information regarding SLEB certification, including requirements, please contact the Auditor-Controller Agency, Office of Contract Compliance & Reporting – SLEB Certification Unit, [OCCR@acgov.org](mailto:OCCR@acgov.org), (510) 891-5500.

In order to meet the Small Local Emerging Business (SLEB) requirements of this IRFQ, all Bidders must complete this form. If a bidder is unable to meet the SLEB requirements, they must take exception to this requirement in the Exceptions and Clarifications section of this solicitation. Please note that the County is under no obligation to accept any exceptions or clarifications, and any exceptions or clarifications may be the basis for bid disqualification.

Bidders that are not certified SLEBS (for the definition of a SLEB, see [Alameda County SLEB Program Overview \[http://acgov.org/auditor/sleb/overview.htm\]](http://acgov.org/auditor/sleb/overview.htm)) are required to subcontract with a SLEB for at least 20% of the total estimated bid amount in order to be eligible for contract award. SLEB subcontractors must be independently owned and operated from the prime Contractor with no employees of either entity working for the other. A copy of this form must be submitted for each SLEB that the Bidder will subcontract with as evidence of a firm contractual commitment to meeting the SLEB participation requirement.

Bidders are encouraged to form a partnership with a SLEB that can participate directly with this contract. One of the benefits of the partnership will be economical, but this partnership will also assist the SLEB to grow and build the capacity to eventually bid as a prime on their own. Once a contract has been awarded, substitutions of the named subcontractor(s) are not allowed without prior written approval from the Auditor Controller, Office of Contract Compliance & Reporting (OCCR).

County departments, prime, and subcontractors are required to use the web-based Elation Systems to monitor SLEB subcontractor compliance with [Elation Systems \[http://www.elationsys.com/elationsys/\]](http://www.elationsys.com/elationsys/).



☐ BIDDER IS A CERTIFIED SLEB (sign at bottom of page)

SLEB BIDDER Business Name:

SLEB Certification #:

SLEB Certification Expiration Date:

NAICS Codes Included in Certification:

OR

☐ BIDDER IS NOT A CERTIFIED SLEB AND WILL SUBCONTRACT % WITH THE SLEB NAMED BELOW FOR THE FOLLOWING GOODS/SERVICES: SLEB Subcontractor

Business Name:

SLEB Certification #:

SLEB Certification Expiration Date:

SLEB Certification Status: ☐ Small / ☐ Emerging

NAICS Codes Included in Certification:

SLEB Subcontractor Principal Name:

SLEB Subcontractor Principal Signature:

Date:

Upon award, Bidder (the Prime Contractor) and all SLEB subcontractors agree to register and use the secure web-based ELATION SYSTEMS. ELATION SYSTEMS will be used to submit SLEB subcontractor participation, including, but not limited to, subcontractor contract amounts, payments made, and confirmation of payments received.

Prime Bidder Authorized Signatory Name/Title:

Street Address:

City:

State:

Zip Code:

Bidder Signature:

Date: