

REQUEST FOR PROPOSALS
FOR
INTENSIVE CASE MANAGEMENT TEAM (ICM)

2023-RFP-004

Request for Proposals Number

2023-RFP-004

Issued:

November 6th, 2023

Bid Submission Deadline:

December 1st, 2023



**Lethbridge Housing
Authority**



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1. PART 1 - INTRODUCTION

1.1. INVITATION

The RFP is an invitation by Lethbridge Housing Authority (LHA) to prospective Proponents to submit detailed proposals for the 2023-RFP-004 Intensive Case Management Team as further described in Appendix A of this RFP (collectively, the “Deliverables”).

1.2. RFP CONTACT

For this procurement process, the LHA will be contacted via email submission only to:

LHAenders@shaw.ca

Proponents and their representatives are not permitted to contact employees, board members, or advisory panel members, other than the stated contact regarding this RFP. Failure to adhere to this rule may result in the disqualification of the proponent and the rejection of the proponent’s current and future proposals.

1.3. TYPE OF CONTRACT FOR DELIVERABLES

The selected proponent will be invited to engage in negotiations with LHA to establish an agreement for the provision of the Deliverables outlined in Appendix A of this Request for Proposal (RFP). LHA intends to enter into an agreement with a single legal entity.

The specific duration of the agreement is detailed in Appendix A.

LHA carries out regular vendor performance evaluations for all contracts. In the event that a contractor receives an unsatisfactory score, they will be asked to participate in a meeting with an LHA representative, either in person or remotely, to collaboratively determine appropriate corrective actions. Failure to address outstanding performance issues may lead to contract termination.

1.4. OPPORTUNITY REQUIREMENTS

The proponent must be a single legal entity that, if selected, intends to negotiate and enter into the contract with Lethbridge Housing Authority. If the proposal is being submitted jointly by two (2) or more separate entities, the proposal must identify only one of those entities as the “proponent”. The proponent will be responsible for the performance of the Deliverables.



1.5. RFP TIMETABLE

1.5.1. Schedule of Activities

The LHA reserves the right to change the RFP schedule as needed. Please note that late applications will not be accepted.

RFPs Issued	November 6, 2023
Deadline for Questions	November 17, 2023
Deadline for Amendments to RFP	November 24, 2023
LHA Responses to Questions (posted on the website)	November 24, 2023
Closing Date Deadline for Proposal Submission	December 1, 2023
Notification to Proponents for Presentations/Interview	December 8, 2023
Presentations/Interview	December 15, 2023
Notification of Award	December 20, 2023
Projected Project Start Date	April 1, 2024

*Dates subject to change- The RFP timetable is tentative only and may be changed by Lethbridge Housing Authority at any time.

1.6. PREBID CONSIDERATIONS

1.6.1. Questions

It is the proponent’s responsibility to ask any questions and examine all existing conditions to determine the amount and character of the work involved and to take their own measurements and make their own calculations before submitting a bid.

Questions are to be submitted via email to LHAenders@shaw.ca with the Subject Line: RFP 2023 Questions. This will be an open-source document and all questions and answers will be provided to respective candidates by 4:30 pm MST on Friday November 17th, 2023.

1.7. AMENDMENT OF PROPOSALS

Proponents may amend their proposals prior to the Submission Deadline. However, the proponent is solely responsible for ensuring that the amended proposal is received by Lethbridge Housing Authority by the Submission Deadline.



1.8. MANDATORY MINIMUM REQUIREMENTS

Proponents who do not meet these requirements will not be considered:

Requirement
Application submitted prior to RFP deadline date
Declaration, including Conflict of Interest declaration, has been completed and signed by the Proponent
RFP Proposal completed in accordance with the instructions
A list of previous related work and references provided demonstrating subject matter expertise
No history of non-performance of contract with LHA

1.9. INSURANCE REQUIREMENTS

1.9.1. Workers Compensation Board (WCB)

The Agency shall purchase and maintain at all times during the term of this Agreement, or as otherwise set out in this Agreement, the insurance coverage as set out in Appendix C- Insurance Requirements attached hereto;

The Agency shall, except as provided in 2. 3. provide:

- a) a valid, current Clearance Certificate declaring that the Agency is registered with Worker’s Compensation Board (“WCB”), and has an account in good standing; or
- b) a Letter of Good Standing issued by WCB.

If WCB coverage is not required by law to be carried by the Agency, the Agency shall provide one of the following (as the case may be):

- a) an Exemption Letter from WCB, satisfactory to Lethbridge Housing Authority’s Chief Administrative Officer; or
- b) an Independent Operators Status Certificate issued by WCB; or
- c) Such further and other evidence as may be satisfactory to Lethbridge Housing Authority’s Chief Administrative Officer.

In addition to the indemnification and without restricting the indemnities provided by the Agency elsewhere in this Agreement, the Agency agrees to indemnify Lethbridge Housing Authority and its respective elected officials, officers, employees, agents, successors and assigns for all losses, claims, expenses (including reasonable legal fees) or other charges related to the Agency’s status with WCB.



1.9.2. Automobile Equipment Insurance (Waived if Proponent does not utilize motor vehicle)

Automobile Liability Insurance on all licensed vehicles owned by or leased to the Proponent, protecting against damages arising from bodily injury (including death) and from claims for property damage arising from the operations of the Proponent, its servants, agents or employees. This insurance shall be for the amount of TWO MILLION DOLLARS (\$2,000,000.00) inclusive per accident.

1.10. WRITTEN PROPOSALS

Interested Proponents are to submit a proposal utilizing the Schedule A: RFP Proposal Response and Bid Questions Form and must address Appendix A- RFP Particulars and Scope of Work of this RFP.

Proposals must include:

- a) contact information including legal entity/name, mailing and email address;
- b) detailed outline of how you will meet the key deliverables/scope of work, including timelines using Schedule- A RFP Proposal Response and Bid Questions Form;
- c) detailed cost/fees using Schedule B- Budgeting Template ;
- d) reference to experience related to performing the required tasks to complete this contract using Schedule A- RFP Proposal Response and Bid Questions;
- e) samples of previous work related to the scope of work outlined in this RFP using Schedule A- RFP Proposal Response and Bid Questions (References section) **OR** submit letters of support for your proposal;
- f) conflict of interest declaration signed by an authorized signatory using Schedule C- Self-Declaration Form.

LHA uses a standardized Proposal Response Form to streamline the application and review process. Proposal responses should be concise but thorough and ensure that each section is answered in its entirety. Attachments may be considered but only if they are relevant to the RFP and demonstrate previous related work and experience.

1.11. CASH FLOW

Funding may be flowed to the agency on a quarterly or monthly basis (for Agencies in Good Standing) of each funding period.

Items to note:

- a) LHA will provide advance funding for the initial funding period;
- b) The Agency will ensure all expenses are in alignment with the Eligible Cost Guidelines/Appendix B;
- c) The Agency shall report its full Financial Disclosure to LHA as requested by LHA; and/or
- d) The Agency will provide yearly audited financials to LHA on renewal of contract; and
- e) At fiscal year-end (as per contract date), the annualized funding will be reconciled, and any slippage dollars identified



1.12. PROCESS

If you are interested in submitting a proposal, the completed proposal and signed declaration shall be delivered via email to the RFP Submission email, LHAtenders@shaw.ca, in PDF format with Subject Line: 2023-RFP-004-Response. A confirmation email will be sent upon receipt. If you do NOT receive a confirmation email, please call:

Kayla Podrasky

403-329-0556 ext 144

To be accepted, proposals must be received by no later than the Closing Date and Time. Proposals received after the Closing Date and Time will not be accepted. LHA has the right to reject any and all proposals at its sole discretion.

Proposal responses should be concise but thorough and ensure that each section is answered in its entirety. You are reminded that your proposal should be inclusive of all taxes, fees and permits, where applicable.

Proposals will be reviewed to determine which is most advantageous to the LHA, guided by the Scope of Work. Selected proposals moving forward in this RFP process may be invited to present via videoconference to LHA, see Presentations/Interview below.

Included in this RFP toolkit are the following documents:

- a) RFP Part 1- Introduction
- b) RFP Part 2- Evaluation, Negotiation and Reward
- c) RFP Part 3- Terms and Conditions of RFP Process
- d) Appendix A: RFP Particulars and Scope of Work
- e) Appendix B: Budget Instructions/ Allowable Administration Expense Chart
- f) Appendix C: Insurance and Indemnification Policy
- g) Schedule A : RFP Proposal Response and Bid Questions Form
- h) Schedule B: Budgeting Template (fillable)
- i) Schedule C: Self-Declaration Form



2. PART 2 -EVALUATION, NEGOTIATION AND AWARD

2.1. STAGES OF CONSIDERATION

LHA will conduct the evaluation of submissions and enter negotiations by the following:

2.1.1. RFP Panel

The selection of Preferred Proponent for the allocation of project funding will be undertaken by the RFP Panel (the "Panel"), who have signed a conflict-of-interest declaration. The Panel's membership shall include LHA staff and individuals with expertise in the RFP subject matter, and may include members at large.

No officers, directors, board members or any employee of a Proponent will participate in the Panel.

The Panel may consult with others, including other LHA staff members, third-party consultants and references, as the Panel may at its discretion decide is required.

2.1.2. Evaluation

Proposals will be reviewed on the basis of alignment with the goals of this RFP, experience, impact to the homeless-serving system of care, ability to perform the Scope of Work, and available dollars. An evaluation panel will evaluate the Proposal based on the written application and the presentation/interview.

2.1.3. Selection

The Panel will consider the Proposal and the Proponents' responses during the presentation/interview. The Panel shall deliberate to form a written recommendation to the LHA of the Preferred Proponent.

LHA will make a final decision on awarding contracts and shall negotiate terms of the contract with the successful Proponent at its discretion.

2.2. CONTRACT NEGOTIATION

All negotiations will be conducted in accordance with the rules outlined in the Terms and Conditions of the RFP Process (Part 3). It should be noted that these negotiations do not constitute a legally binding offer from either LHA or the proponent to enter into a contract. No legally binding relationship will be established with any proponent until a written agreement has been executed. During the negotiations, LHA may request additional information from the proponent to verify, clarify, or supplement the details provided in their proposal. Additionally, LHA may also seek improved pricing or performance terms from the proponent during the negotiation process.



2.3. NEGOTIATION TIME FRAME

LHA plans to complete negotiations and reach a final agreement with the top-ranked proponent during the Contract Negotiation Period. This period will commence from the date LHA invites the top-ranked proponent to engage in negotiations.

2.4. FAILURE TO ENTER INTO AGREEMENT

In the event that the pre-conditions of the award specified in Appendix A- RFP Particulars and Scope of Work are not fulfilled or if the parties are unable to conclude negotiations and finalize the agreement for the Deliverables within the Contract Negotiation Period, LHA reserves the right to cease negotiations with the top-ranked proponent. LHA may then invite the next-ranked proponent to enter into negotiations. This process will continue until an agreement is successfully reached or until there are no eligible proponents remaining for negotiations, or if LHA decides to cancel the RFP process.

2.5. WEIGHTED CRITERIA

Category	Available Points
ORGANIZATIONAL CAPACITY	40
Relevance of previous service experience (5 points)	
Staff Model and Descriptions (10 points)	
Staff planning model for shortages/issues (10 points)	
Staff Training/Certification (5 points) Staff Availability (10 points)	
VISION	35
Service description for prospective clients (10 points)	
Intention for cultural relevance in all aspects of service. (5 points)	
Understanding of and ability to respond to participant needs and strengths. (10 points) Recovery-focused modeling. (10 points)	
COMMUNITY ALIGNMENT	25
Contribution or cooperative work done with other community organizations (10 points)	
Good neighbor policies and mitigation within the community of the program participants (10 points) Success stories and work within the community (5 points)	
BUDGET	15
Key considerations for the transition of participants to the new service (5 points) Appropriate and feasible budget outline for a staff model that meets expectations (10 points)	
TOTAL POINTS	115



2.6. RATINGS

Proposals will be evaluated and ranked according to the outline below. The evaluation will be based on a 0-10 scale or 0-5 scale.

RATING		DESCRIPTION
10	5	Exceeds expectations; Proponent clearly understands the requirement; comprehensive response with relevance and includes improvement through innovation and added value; excellent probability of success.
8	4	Meets expectations; Proponent has a good understanding of the requirement; comprehensive response in terms of detail and relevance to the requirements; good probability of success.
6	3	Partially meets expectations; Proponent has a good understanding of the requirement, however, fails in some areas, an acceptable level of detail of accuracy; fair probability of success.
4	2	Limited information was provided with an inadequate response. Only partially demonstrates an understanding of the requirements; low probability of success.
2	1	Inadequate detail was provided. Questions unanswered or addressed. Meets mandatory requirements only. Extremely limited chance of success.
0	0	Lack of response or a complete misunderstanding of the requirements, no probability of success.

3. PART 3 - TERMS AND CONDITIONS OF THE RFP PROCESS

3.1. GENERAL INFORMATION AND INSTRUCTIONS

3.1.1. Instructions

Proponents are advised to organize their proposals in alignment with the instructions provided in this Request for Proposal (RFP). When providing information, it is important to reference the relevant section numbers of this RFP in the proposal response. This will help ensure clarity and facilitate the evaluation process.

3.1.2. Past Reference and Experience

During the evaluation process, LHA retains the right to incorporate information provided by the proponent's references. Furthermore, LHA may consider the proponent's past performance or conduct on previous contracts with LHA or other institutions. Such factors may be taken into account as part of the evaluation process to assess the proponent's overall suitability and ability to meet the requirements of the current project or contract.

3.1.3. Exclusivity and Volume

LHA does not provide any assurance regarding the specific value or volume of work that will be allocated to the successful proponent. The agreement to be negotiated with the selected proponent will not grant exclusivity for the provision of the described Deliverables. LHA reserves the right to engage with other parties for goods and services that are the same as or similar to the Deliverables, or alternatively, may obtain such goods and services internally.

3.1.4. Costs

The proponent is solely responsible for any and all costs incurred or experienced during the preparation and presentation of their proposal. LHA assumes no liability for these costs and does not provide reimbursement for any expenses related to the proposal process.

3.1.5. Language

All proposals are to be in English only.

3.1.6. Provided Information

LHA and its advisers do not provide any representation, warranty, or guarantee regarding the accuracy of the information contained in this RFP or any additional information provided through addendums or subsequent documents. Any quantities shown or data contained in this RFP or provided by way of attachment are estimates only and are for the sole purpose of indicating to proponents the general scale



and scope of the Deliverables. It is the proponent's responsibility to obtain all the necessary information to prepare a proposal in response to this RFP.

3.2. ISSUANCE OF RFP

Communication after the issuance of the Request for Proposal (RFP) should follow the guidelines outlined below:

3.2.1. Clarification Requests

Proponents may submit clarification requests regarding the RFP by the specified deadline for questions. These requests should be sent in writing or through the designated communication channel stated in the RFP. LHA will provide clarifications to ALL eligible proponents to ensure a fair and transparent process.

3.2.2. Addenda

If necessary, LHA may issue addenda to address any significant inquiries or provide additional information. Proponents should carefully review and consider any addenda during the proposal preparation process.

3.2.3. Post Deadline Addenda

If LHA determines that it is necessary to issue an addendum after the Deadline for Issuing Addenda, LHA may extend the Submission Deadline for a reasonable period of time as LHA sees fit.

3.2.4. Prohibited Communication

Proponents should refrain from any direct communication regarding the RFP with LHA staff, evaluators, or other individuals involved in the selection process, except as explicitly permitted in the RFP instructions.

3.2.5. Official Contact Point

Any communication related to the RFP should be directed to the designated contact person or contact point mentioned in the RFP document. This helps ensure consistency, proper record-keeping, and effective coordination of the RFP process.

3.2.6. Supplemental Information

LHA may request further information from the proponent or third parties in order to clarify or supplement the information that was provided in the proponent's proposal, including but not limited to clarification with respect to whether the proposal meets the mandatory requirements designated in



Appendix A- RFP Particulars and Scope of Work. LHA may re-evaluate and adjust the scoring of the proponent's response or ranking on the basis of such information.

3.3. NOTIFICATION AND COMPLETION

3.3.1. Notification to Other Proponents

Upon the execution of an agreement between LHA and a proponent, the remaining proponents will be notified of the completion of the procurement process through a public posting. This notification will be carried out in the same manner as the initial posting of the RFP, ensuring transparency and providing all proponents with information about the conclusion of the procurement process.

3.3.2. Debriefing

Proponents may request a debriefing meeting with LHA after receipt of notification of the outcome of the procurement process. All requests must be in writing to the RFP Contact and must be made within thirty (30) days of such notification.

LHA reserves the right to decline such a request if deemed inappropriate.

3.3.3. Protest of Procurement Procedure

If, after attending a debriefing, the proponent wishes to challenge the RFP process, it must provide written notice to the RFP Contact in accordance with applicable procurement protest procedures. The written notice must contain:

- a) a clear statement as to which procurement the proponent wishes to challenge;
- b) a clear explanation of the proponent's concerns with the procurement, including specifics as to why it disagrees with the procurement process or its outcome; and
- c) the proponent's contact details, including name, telephone number and email address.

Lethbridge Housing Authority will send an initial response to acknowledge receipt of the proponent's notice and indicate the date by which Lethbridge Housing Authority will provide the proponent with a formal response.



3.4. CONFLICT OF INTEREST AND CONDUCT

LHA RFP Conflict of Interest and Prohibited Conduct provisions serve to ensure fairness, integrity, and transparency throughout the procurement process.

3.4.1. Conflict of Interest

Proponents are required to disclose any actual or potential conflicts of interest that may arise during the RFP process. For the purposes of this RFP process, the term Conflict of Interest includes but is not limited to, any situation or circumstances where:

- a) in relation to the RFP process, the proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information that is not available to other proponents, (ii) communicating with any other person with the view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision-makers involved in the RFP process), or (iii) engaging in conduct that compromises or could be seen to compromise, the integrity of the open and competitive RFP process or render that process non-competitive or unfair; or
- b) in relation to the performance of its contractual obligation under a contract for the Deliverables, the proponent's other commitments, relationships, or financial interests.

3.4.2. Disqualification for Conflict of Interest or Prohibited Conduct

LHA may disqualify a proponent, rescind an invitation to negotiate or terminate a contract subsequently entered into if LHA determines that the proponent has engaged in any conduct, situation, or circumstances, determined by LHA, in its sole and absolute discretion, to constitute a Conflict of Interest as defined above or in any conduct prohibited by this RFP.

3.4.3. Prohibited Proponent Communications

Proponents must not engage in communication that could constitute a Conflict of Interest and should take note of the Conflict of Interest declaration set out in Appendix X.

3.4.4. Media Communication

Proponents must not engage with the media at any time regarding the RFP process, or any agreement entered into pursuant to this RFP, directly or indirectly, without first obtaining the express written consent of the RFP Contact.

3.4.5. Lobbying

Proponents are explicitly prohibited from engaging in any form of lobbying as part of the RFP process. This means that proponents must not engage in any activities aimed at influencing or exerting undue pressure on LHA employees, Board members, or decision-makers in an attempt to gain an unfair



advantage or influence the outcome of the RFP through improper means, personal connections, or any form of unauthorized communication.

3.4.6. Unethical or Illegal Conduct

Proponents are strictly prohibited from engaging in any illegal business practices during the RFP process. These practices include, but are not limited to:

- a) **Bid-Rigging:** Proponents must not collude or engage in activities that manipulate the competitive bidding process, such as bid rotation, bid suppression, or market allocation.
- b) **Price-Fixing:** Proponents must not engage in any agreement or arrangement with competitors to fix prices, allocate customers, or control market conditions.
- c) **Bribery:** Proponents must not offer, provide, or accept bribes, kickbacks, or any other form of improper or illegal inducement to influence the RFP process.
- d) **Fraud:** Proponents must not engage in fraudulent activities, such as providing false information, forging documents, or misrepresenting facts in their proposals.
- e) **Coercion or Collusion:** Proponents must not engage in coercive tactics or collude with other parties to gain an unfair advantage or compromise the integrity of the RFP process.

3.4.7. Past Performance or Past Conduct

LHA may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, including but not limited to the following:

- a) illegal or unethical conduct as described above;
- b) the refusal of the supplier to honour its submitted pricing or other commitments; or
- c) any conduct, situation or circumstance determined by LHA, in its sole and absolute discretion, to have constituted an undisclosed Conflict of Interest.

3.5. CONFIDENTIAL INFORMATION

3.5.1. Confidential Information of LHA

By accepting to take part in this proposal process, the Proponent agrees to keep in confidence all information imparted to them in relation to the proposal process; not to disclose it to third parties, and not to use it for any other purpose than for the proposal unless written consent has been obtained from the RFP Contact and must be returned by the proponent to LHA immediately upon request by LHA.

3.5.2. Confidential Information of Proponent

LHA will hold all information provided during the proposal process confidential, with the exception of queries made by proposing agencies. LHA reserves the right to reasonably share queries and its responses with other participating organizations *see Section 5.0 Questions. A proponent should identify any information in its proposal or any accompanying documentation supplied in confidence to



LHA that confidentiality is to be maintained. The confidentiality of such information will be maintained by LHA, except as otherwise required by law or by order of a court or tribunal.

3.6. PROCUREMENT PROCESS

3.6.1. No Contract A and No Claims

This procurement process is not intended to create and will not create a formal, legally binding bidding process and will instead be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation:

- a) this RFP will not give rise to any Contract A- based tendering law duties or any other legal obligations arising out of any process contract or collateral contract;
- b) and neither the proponent or LHA will have the right to make any claims (in contract, tort, or otherwise) against the other with respect to the award of a contract, failure to award a contract, or failure to honour a proposal submitted in response to this RFP.

3.6.2. No Contract until Execution of Written Agreement

This RFP process is intended to identify prospective suppliers for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any goods or services will be created between the proponent and LHA by this RFP process until the successful negotiation and execution of a written agreement for the acquisition of such goods and/or services.

3.6.3. Budget

Proponents are required to submit a completed budget with their proposal. Please refer to Appendix B for details on Eligible Expenses and Schedule B- Budget for the fillable form.

3.6.4. Cancellation

LHA may amend or cancel the RFP process without liability at any time.

3.6.5. Governing Law and Interpretation

These Terms and Conditions of the RFP Process (Part 3):

- a) are intended to be interpreted broadly and independently (with no particular provision intended to limit the scope of any other provision);
- b) are non-exhaustive and will not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations; and
- c) are to be governed by and construed in accordance with the laws of the province of Alberta and the federal laws of Canada applicable therein.



3.6.6. Limitations of Liability

By submitting a proposal, the Proponent irrevocably waives, on behalf of itself and its predecessors, successors, parent companies, subsidiary companies, affiliates and assigns, and its and their past, present, and future officers, directors, shareholders, interest holders, members, partners, lawyers, agents, employees, managers, representatives, assigns, and successors in interest, any claims whatsoever and howsoever arising, including claims for compensation, costs, damages, expenses, losses, and loss of profits, relating to the RFP or with respect to the RFP competitive process or any contract arising in the RFP process, including claims for costs, expenses and loss of profits if no contract is made with the Proponent.



4. APPENDIX A- RFP PARTICULARS

4.1. DELIVERABLES

Lethbridge Housing Authority (LHA) is requesting detailed submissions from qualified and experienced service providers for a Scattered Site Intensive Case Management program.

LHA is the newest CBO in Alberta and is tasked with ending homelessness in Lethbridge. Through Provincial OSSI funding, we are looking for a service provider to deliver an intensive case management program for residents of Lethbridge who have a history of homelessness.

Case Management programs may cover a range of demographic groups, specifically Prevention/Rapid Rehousing for lower acuity participants, Case Management for Mid-Acuity participants, and Case Management for High-Acuity participants. This Case Management is expected to have no other qualifiers besides the acuity level. Applicants are not required to provide all three levels of Case Management, but can should the applicant see an opportunity within their program to successfully support participants of various acuity levels.

Scattered Site Intensive Case Management services are based on an intensive case management and supportive living approach that includes but not limited to:

4.2. RESPONSIBILITIES

- Assisting clients through the development of Individual Service Plans (ISPs) and aiding clients through the detailed steps to maintain housing by addressing root causes of homelessness using a recovery base focus and achieving self-identified goals
- Facilitating additional supports for clients through education and enrollment of the programs and services available to them. (medical, rent supplements, etc)
- Negotiating and providing support for tenancy/landlords and ensuring that rent is paid as required to maintain long-term housing
- Providing services within the participants' homes as well as other natural settings
- Transportation of clients as required to appointments

4.3. STAFFING EXPECTATIONS

- Applicants must provide their staffing model (i.e. if only working in teams of two is a requirement)
- Provide crisis support as needed
- Provide detailed reporting into Efforts to Outcomes software as required
- Maintain detailed client files
- Ability to build trusting relationships with clients



- Base client interactions and relationships on prevention rather than reaction
- Adaptability and flexibility to aid clients in long-term success and independence

See Appendix A- RFP Particulars and Scope of Work for a more detailed outline of information. Targets and outcomes will be finalized in the Contract for Service during negotiations.

Housing for program participants will be scattered-site housing. Participants will live in affordable, supportive or market rental units spread throughout Lethbridge. Priority will NOT be given to proponents with housing availability.

4.4. WHO CAN APPLY FOR THIS FUNDING?

Proponents can be:

- a) a registered non-profit
- b) a for-profit organization – however the proposal must not exceed fair market value and must support the priorities and objectives of the community
- c) Indigenous organizations

4.5. SUBMISSION REQUIREMENTS- IMPLEMENTATION

Use Schedule A: Proposal Response and Bid Questions Form to guide your submission responses and answers in the order of the provided questions.

4.5.1. Organizational Capacity:

Describe your relevant experience and what sets your organization and program apart.

- a) Include a profile of your organization and demonstrate how this program complements your organization's strengths.
- b) What are your staffing and short-staffing contingency plans?
- c) Provide examples of other relevant services provided by your organization.
- d) Describe staff training plans and skills assessment.
- e) Cultural training or any other specific training that may aid your organization in helping the chronically homeless in Lethbridge.

4.5.2. Vision for the Service:

Describe your overall intention for the program, as well as provide details of what will make up your program's pillars and challenges.

- a) Provide a service orientation for a prospective client; what are your expectations of them and for your organization?
- b) What does recovery focus mean to you and your organization?
- c) What do you anticipate being clients' biggest needs and issues in the first sixty (60) days?
- d) Explain what a successful candidate looks like for this program and what a successful graduate of your program looks like.



4.5.3. Community Alignment

Describe what Lethbridge and the community is to your program and what can you bring to the community to help with the challenges it is facing.

- a) What organizations do you work with within our community?
- b) Are you accredited?
- c) What makes a program a good neighbor? How do you intend to keep interactions with the community positive?
- d) Share your success stories, what made them successful, and what you are bringing with you to this proposal.

4.5.4. Budget

Describe your financial background, what would you like to accomplish in the first year, and foreseeable financial challenges to the success of your program.

- a. Describe the necessities for the program start-up and how you plan to achieve and fund them. What staggered start date services will you provide and why in this order?
- b. Does your first-year budget scalable to an increased population of service in future years? (What is your per-client cost based on ten (10) clients vs twenty (20) clients providing the same service?)

4.6. SUPPLEMENTAL REQUIREMENTS (UPON AWARD):

- a. Reconciled Budget: a copy of the reconciled Schedule B budget will be submitted monthly or quarterly (as agreed upon in the Contract) showing expenditures, client contributions, and all shortfalls or surpluses.
- b. Tracking Sheet: monthly submission of agreed-upon tracking report of cases and interactions, issues, or general reports.
- c. ETO Input: Requested Program Data will be entered into ETO regularly, with finalized monthly report data being available for LHA and GoA access within five (5) days of the last day of the previous month.
- d. Incident Reporting: any incident as identified in the Contract will be reported to the LHA administrator within 24 hours of said incident with a full Incident Report to follow within 24 hours.
- e. Year-End Financial Statements: final Schedule B submitted by April 10th, with a review engagement statement and audited financial statements by an independent, professionally designated accountant.

4.7. MANDATORY SUBMISSION REQUIREMENTS

- 4.7.1. Schedule A : RFP Proposal Response and Bid Questions Form**
- 4.7.2. Schedule B: Budgeting Template (fillable)**
- 4.7.3. Schedule C: Self-Declaration Form**



4.8. MANDATORY TECHNICAL REQUIREMENTS

Please review Appendix C- Insurance Requirements for mandatory minimum insurance requirements for the successful proponent. Insurance is to be in effect before the commencement of the project.

4.8.1. Certificate of Insurance (Provided upon reward only)

The Proponent shall provide the following insurance upon award, to be placed with a company and in a form as may be acceptable to the Corporation. This insurance shall remain in force until the date of the completion of the contract, unless otherwise stipulated, and shall provide for THIRTY (30) days prior notice of cancellation, lapse, or material change, and designate LHA as additionally insured.

Any changes in coverage must be immediately relayed to LHA with a new Certificate of Insurance with conditions not less than noted above.

4.8.2. Comprehensive General Liability Insurance

Comprehensive General Liability Insurance protecting the Owner, the Proponent and their respective servants, agents, or employees against damages arising from personal injury (including death) and claims for property damage which may arise out of the operations of the Proponent, its sub-contractors, and their respective servants, agents, or employees under the Agreement.

This insurance shall be for an amount of not less than TWO MILLION DOLLARS (\$2,000,000.00) inclusive per occurrence and shall include a standard form of a cross-liability clause. Complete operations coverage shall be maintained for at least TWENTY-FOUR (24) months after the date of the close of the contract, and proof of the same will be provided to LHA.

4.8.3. Automobile Mobile Equipment Insurance

Automobile Liability Insurance on all licensed vehicles owned by or leased to the Proponent, protecting against damages arising from bodily injury (including death) and from claims for property damage arising from the operations of the Proponent, its servants, agents or employees. This insurance shall be for the amount of TWO MILLION DOLLARS (\$2,000,000.00) inclusive per accident.

4.8.4. WCB Clearance Letter

Clearance Letters will be pulled monthly and the contract may be suspended immediately with a lapse in coverage

4.8.5. References

Use Schedule A- RFP Proposal Response and Bid Questions Form to supply references **OR** provide Letters of Support



4.9. SCOPE OF WORK

Details of the Scope of Work and expectations can be found in the Housing and Support Handbook, found on the LHA website or you may ask for an electronic copy to be provided. A summary of the basic scope is provided below.

Scope of Work

ITEMS	DETAILS
<p>Ensure a qualified staff team at all times</p>	<p>Within 14 days of hire:</p> <ul style="list-style-type: none"> • Review Housing and Support Handbook • Review Service Provider specific policies and procedures <ul style="list-style-type: none"> ○ Includes Working Safely Alone and Incident Reporting • Documentation Training • FOIP Training • Assessment Tool Training <p>Within 6 months of hire:</p> <ul style="list-style-type: none"> • Standard First Aid and CPR • Disease Prevention and Universal Precautions • Crisis Intervention/De-Escalation • Suicide Intervention • Motivational Interviewing • Workplace Mental Health • Trauma Informed Care
<p>Ensure clients are informed of expectations.</p>	<ul style="list-style-type: none"> • What services the program delivers. • The program’s expectations are of the participant, including: <ul style="list-style-type: none"> ○ Engagement with supports ○ Regular communication with program staff ○ Expectations around home visits ○ Integration with community services ○ Respectful and non-threatening interactions with program staff • Which portion (if any) of the program is optional. • Discharge process, both planned and unplanned.
<p>Maintain participant engagement and relationship building.</p>	<ul style="list-style-type: none"> • Provide services within the participants’ home as well as other natural settings • Interact with participants by phone, text, email, in person, or by any other means that the participant requires • Take reasonable steps to engage participants and may work with other agencies within the community to utilize some relationship equity of these agencies



<p>Report on activities using required reporting tools and participate in Grant Accountability Review processes as required.</p>	<p>Service Providers are expected to have a policy or policies that meet the following minimum standards of expectation:</p> <ul style="list-style-type: none"> • All Individualized Service Plans (ISPs) are to be documented, either digitally or by paper copy. Digital copies must be encrypted. • All significant participant interactions will be documented regardless of the type of interaction (in-person, via email, text, voicemail, letter, etc.). Participants may review their case files at their request. The Funder may review documentation by request. • Any case conferences that occur will be documented, and the Case Manager will be responsible for collecting and distributing to all support staff involved. • Case notes and other participant documentation are to be written using professional language and will strictly report facts and observations. • Documentation that is requested by subpoena or other appropriate legal means will be provided in accordance with said legislation. • Service Providers are required to have a Data Quality Plan that will ensure the information entered into ETO is complete, accurate, reliable, valid, and updated regularly. • To monitor the results of the system and ensure that Key Performance Indicators, locally derived system and Service Provider Outcomes, and OSSI Outputs are being met.
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5. APPENDIX B- BUDGET

Instructions on How to Provide Budget

- a) Proponents will provide the required budget information requested by completing the Schedule B- Budgeting template. This can be found in the documents section and completed in Excel format. Attach the completed file to your submission.
- b) Budget is for one annual funding period only. Payments are monthly or quarterly. Include ALL anticipated revenue sources for the project, including in-kind contributions and client contributions.

BUDGET AREA	NOTES
Eligible Staff Costs	<ul style="list-style-type: none"> • Salaries for project staff: hourly salary, hours of work per week, number of paid weeks per year • Vacation pay: included in the salary line or accrued in an accrual account. If accrued, the salary line is adjusted • Professional development, including core training, conferences and other training needs • Travel expenses • Professional registrations
Eligible Project Costs	<ul style="list-style-type: none"> • Participant support fund: start-up costs for participants in housing, bus tickets, gift cards • Project staff cell phones • Program Supplies
Eligible Administration costs not to exceed 10% of Total Budget	<ul style="list-style-type: none"> • Management fees • Equipment purchase and repair • Bookkeeping/Admin • Audit fees • Bank Fees • General liability insurance • Office supplies • Printing/photocopying • Meetings • Other negotiated costs
Ineligible Project Costs	<ul style="list-style-type: none"> • Entertainment expenses • Bonuses, gifts of any kind • Substance testing of any kind • Late fees/penalties on invoices • Court/provincial issued fines • Membership fees for clubs • Participant cellphones



6. APPENDIX C- INSURANCE

6.1. INDEMNIFICATION AND INSURANCE

The Contractor shall indemnify, defend, pay on behalf of and hold harmless Lethbridge Housing Authority (“LHA”), its officers, officials, agents; representatives, employees and volunteers from and against all loss, claims, demands, costs (including solicitor client costs), damages, actions, suits, or proceedings arising out of or in connection with the activities or performance by the Contractor, his agents, representatives, employees or subcontractors. The liability of the Contractor shall survive the termination of this agreement.

6.2. INSURANCE

Without restricting the generalities of the foregoing indemnification requirements, the Contractor shall procure, maintain, keep in force for the duration of the contract and pay for coverage listed in this condition, unless otherwise stipulated, in a form acceptable to LHA with Insurer(s) licensed in Alberta .

6.2.1. Minimum Scope of Coverage

Commercial General Liability Insurance: Occurrence Form coverage as respects liability arising out of activities performed by or on behalf of the Contractor including Non- Owned Automobile Liability, Broad Form Property Damage Liability, Tenants All Risk Legal Liability, Products and Completed Operations Liability, Contingent Employer Liability, Blanket Contractual Liability and Abuse Liability.

All Risk Property Insurance: Covering loss or damage to the Contractor's. own chattels, construction machinery, tools and equipment owned, borrowed or leased by the Contractor in performing the work as specified in the contract in accordance with, at minimum, the actual cash value. of such tools and equipment. LHA is not responsible for loss or damage to the property of others.

Automobile Liability Insurance: Covering all vehicles owned, operated or licensed in the name of the Contractor. If the Contractor does not own any automobiles or will not be bringing owned automobiles on site, this requirement is waived.

6.2.2. Minimum Limits of Insurance

The Contractor shall maintain limits no less than:

- Commercial General Liability: \$5,000,000 combined single limit per occurrence for personal injury, including bodily injury and or death, sustained by any person or persons and damage to property.
- Abuse Liability: \$1,000,000 combined single limit with a \$1,000,000 annual aggregate.
- Automobile Liability: \$2,000,000 combined single limit per accident for bodily injury and property damage.



6.2.3. Other Insurance Provisions.

The policies are to contain, or be endorsed to contain, the following General Liability Policy extensions:

- LHA shall be added as Additional Insured as respects liability arising out of activities performed by or on behalf of the Contractor and the coverage shall contain no special limitations on the scope of protection afforded by LHA.
- The coverage shall include a Cross Liability or Severability of Interest wording to the effect that the coverage shall apply to each insured in the same manner as if separate policies had been issued to each. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to LHA.

6.2.4. Cancellation of Insurance Coverage

Each insurance policy required by the clause shall be endorsed to state that each insurer will endeavor to provide LHA with 30 days prior written notice of cancellation by registered mail.

6.2.5. Verification of Coverage

The Contractor shall furnish LHA with a Certificate of Insurance and original endorsements affecting coverage required by this clause. Said documents are to be signed by a licensed Insurance Broker. All certificates and endorsements are to be received and approved by LHA before work commences. Unless specified otherwise, the duration of each policy shall be from the date and time of commencement of the work until the date of completion, as determined by LHA, or upon expiration of any applicable warranty period. LHA reserves the right to require complete, certified copies of all required insurance policies at any time and to accept or reject the Contractor's Insurer.

Renewal: The Contractor shall provide evidence of the renewal of policies described above by providing a new or renewal certificate, to be received within thirty (30) days of the renewal date of each policy.

6.2.6. Representation

LHA does not make any representation or warranty with respect to the extent or adequacy of the insurance protection as noted in the foregoing.

6.2.7. Obligations

The furnishing of this insurance shall not limit any of the obligations or liabilities expressed elsewhere in the contract documents.

6.2.8. Contractor and Subcontractors

The Contractor shall ensure that all subcontractors they hire comply with the insurance requirements outlined above.



6.2.9. Reporting of Accidents

The Contractor shall report all incidents of injury, including death, and or property damage occurring during their work activities and/or operations to LHA as soon as practical after the accident or incident. The Contractor must submit a copy of the Incident Report to LHA immediately upon completion. The Contractor shall cooperate and assist LHA if further investigation of the incident is deemed necessary.



7. SCHEDULE A – RFP RESPONSE FORM AND BID QUESTIONS

DEADLINE FOR PROPOSAL SUBMISSION: IS DECEMBER 1ST, 2023 @ 4:30 PM MST

PLEASE SUBMIT PROPOSALS AND ANY QUESTIONS TO LHATENDERS@SHAW.CA

PLEASE COMPLETE THIS FORM IN ITS ENTIRETY AND SUBMIT WITH SUBJECT LINE: **2023-RFP-004-RESPONSE**

Applicant/Agency/Organization Name <small>(as formally registered)</small>	
Applicant Address	
Primary Contact Name & Position	
Phone #	
Email Address	
Secondary Contact Name & Position <small>(if different from Primary Contact)</small>	
Email Address	

PROJECT OUTLINE

PROVIDE A DETAILED OUTLINE OF YOUR UNDERSTANDING OF THE PROJECT BY ANSWERING THE QUESTIONS BELOW.

Organizational Capacity	<p>Using a profile of your organization, describe your previous experience as an ICM provider and how you are uniquely positioned to provide these services to clients in need of these supports in Lethbridge.</p> <p>If you are a new provider, explain how you are wanting to change the landscape of Case Management in Lethbridge and</p>	
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Organizational Capacity	how are you uniquely positioned to provide these services.	
	What staffing model are you proposing?	
	What is your contingency plan for staffing shortages? How many backup staff do you have and how will staff be notified of potential shortages to ensure no clients are left without supervision?	
	How will Individual Service Plans (ISPs) for each client be monitored and how often will they be reviewed for changes or new paths?	
	Provide details and descriptions of your current staffing model (with job descriptions) and how will this change if successful in this bid?	
	Detail how you will ensure your team is skilled in working with people with a history of chronic homelessness, as well as Indigenous peoples.	
	Do you utilize specific hiring practices or training that will be of benefit to New Comers?	
	Provide a service orientation for a prospective client, as to what your expectations are of them and for your organization.	
	What services will set your program apart? When do you anticipate each stage becoming active/available and what staff member(s) will be responsible for the service?	



Vision	Detail how do you intend to provide a culturally relevant and safe environment and specific programming for Indigenous and minority groups.	
	What do you see as the three (3) greatest needs for clients during the first sixty (60) days of programming and how will you address those needs?	
	What do you see as a successful Graduate of your program? Detail how they will achieve this and what specifically will your program do to help with client success and progression.	
	Explain how the recovery-focused lens applies to your program. How do you address addiction?	
Community Alignment	Are you accredited? If so, with whom? What advantages does this provide to the program and what additional procedures are you required to follow?	
	Describe how you expect to implement good neighbor policies into your program and how you will enforce them.	
	Describe your current success stories and what can you take from that experience to apply to this program.	
	What volunteer programs or school practicum programs do you utilize?	
	Describe how your program will contribute to or complement the work done by other service	



	providers currently providing services to clients in Lethbridge.	
Budget	Will/Does your organization utilize additional funding- what programs and amounts?	
	Detail your plan for the client's transition into this program and how you expect to alleviate the client's stress.	
	What start-up costs are you anticipating for this program and how do you intend to cover any overages?	
	Who is handling reporting to ETO? What background do you have with the program and how often are you providing updates?	

7.1. REFERENCES OR ATTACH LETTERS OF SUPPORT

Description	Reference #1	Reference #2	Reference #3	Additional Reference
Company Name				
Address				
City				
Province				
Postal Code				
Contact Name				
Contact Title				
Email				
Phone				
Description of work performed				
Comments				



7.2. SCORING

Category	Available Points
ORGANIZATIONAL CAPACITY	40
Relevance of previous service experience (5 points) Staff Model and Descriptions (10 points) Staff planning model for shortages/issues (10 points) Staff Training/Certification (5 points) Staff Availability (10 points)	
VISION	35
Service description for prospective clients (10 points) Intention for cultural relevance in all aspects of service. (5 points) Understanding of and ability to respond to participant needs and strengths. (10 points) Recovery-focused modeling. (10 points)	
COMMUNITY ALIGNMENT	25
Contribution or cooperative work done with other community organizations (10 points) Good neighbor policies and mitigation within the community of the program participants (10 points) Success stories and work within the community (5 points)	
BUDGET	15
Key considerations for the transition of participants to the new service (5 points) Appropriate and feasible budget outline for a staff model that meets expectations (10 points)	
TOTAL POINTS	115

7.3. RATING

Proposals will be evaluated and ranked according to the outline below. The evaluation will be based on a 0-10 scale or 0-5 scale.

RATING		DESCRIPTION
10	5	Exceeds expectations; Proponent clearly understands the requirement; comprehensive response with relevance and includes improvement through innovation and added value; excellent probability of success.
8	4	Meets expectations; Proponent has a good understanding of the requirement; comprehensive response in terms of detail and relevance to the requirements; good probability of success.
6	3	Partially meets expectations; Proponent has a good understanding of the requirement, however, fails in some areas, an acceptable level of detail of accuracy; fair probability of success.
4	2	Limited information was provided with an inadequate response. Only partially demonstrates an understanding of the requirements; low probability of success.
2	1	Inadequate detail was provided. Questions unanswered or addressed. Meets mandatory requirements only. Extremely limited chance of success.
0	0	Lack of response or a complete misunderstanding of the requirements, no probability of success.



8. SCHEDULE B- FILLABLE BUDGET FORM

See Schedule B – Budget Form Fillable which is attached.

To be completed and submitted in Excel format, using the allowable expenses from Appendix B- Budget.



9. SCHEDULE C- SELF DECLARATION FORM

1. Acknowledgment of Non-binding Procurement Process

The proponent recognizes that the RFP process will be conducted in accordance with the terms and conditions outlined in the RFP. These terms and conditions clarify, among other things, that this procurement process does not constitute a formal, legally binding bidding process. The RFP bidding process does not establish a Contract A. No legal relationship or obligation concerning the procurement of any goods or services will be established between LHA and the proponent unless and until LHA and the proponent execute a written agreement specifically addressing the Deliverables.

2. Ability to Provide Deliverables

The proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required. The proponent represents and warrants its ability to provide the Deliverables in accordance with the requirements of the RFP.

3. Non-binding Price Estimates

The proponent has submitted its rates in accordance with the instructions in this RFP. The proponent confirms that the pricing information provided is accurate. The proponent acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its quotation or its eligibility of future work.

4. Addenda

The proponent is deemed to have read and considered all addenda issued by LHA prior to the Deadline for Issuing Addenda.

5. No Prohibited Conduct

The proponent declares that it has not engaged in any conduct prohibited by this RFP.

6. Disclosure of Information

The proponent acknowledges and agrees that any information included in this proposal, regardless of whether it is designated as confidential, may be disclosed as necessary under applicable laws, court orders, or tribunal requirements. Additionally, the proponent consents to the confidential disclosure of this proposal by LHA to its appointed advisors involved in the RFP process. This disclosure may include sharing the proposal for evaluation purposes.

I have the authority to bind the organization.

7. Conflicts of Interest

Please provide complete information regarding any potential Conflicts of Interest, as per the Conflict of Interest terms stated in the solicitation document. This includes disclosing the names and all relevant details of individuals (such as employees, advisors, or individuals serving in any other capacity) who meet the following criteria:

(a) They participated in the preparation of the proposal.

(b) They were employees or contractors of LHA within the twelve (12) months preceding the RFP Submission Deadline.



To indicate that there are no Conflicts of Interest in your submission and that there are no foreseeable Conflicts of Interest in fulfilling the contractual obligations outlined in the solicitation document, please tick the box below with a "no." By doing so, you will be considered to have made this declaration.

Otherwise, if the statement below applies, select the "yes" box.

- You declare that there is an actual or potential Conflict of Interest relating to the preparation of your submission, and/or you foresee an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the solicitation document.

Yes

No

The proponent acknowledges and agrees that the addendum/addenda below form part of the Bid Submission.

Please check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed this addendum and attachments if applicable	Pages
	<input type="checkbox"/>	
	<input type="checkbox"/>	

8. Sub-Contractors

The proponent must provide a comprehensive list of subcontractors and their respective types of work proposed for this project. It is important that proponents refrain from using "TBD" (To Be Determined), "TBA" (To Be Announced), or any similar wording. Multiple choices of subcontractor names should not be indicated for any subcontractor category in their list. The proponent is required to state only one (1) subcontractor for each type of work.

Subcontractor/Consultant

The following work will be performed (or provided) by Subcontractors and coordinated by the agency.

By selecting this box, I confirm there are **NO** Subcontractor(s) and the proponent shall complete/perform all tasks of the project with their **"OWN FORCES"**.

Subcontractor/Consultant Name	Work/Task Being Performed