



# LOS ANGELES COMMUNITY COLLEGE DISTRICT

CITY / EAST / HARBOR / MISSION / PIERCE / SOUTHWEST / TRADE-TECHNICAL / VALLEY / WEST

RFP Number: 24-08: BOND PROGRAM MONITOR – LACCD PROPOSITIONS A AND AA AND MEASURES J, CC AND LA

Addendum Number: 3

Date: November 18, 2024

**NOTICE TO PROPOSERS:** THIS ADDENDUM SHALL BECOME PART OF THE RFP, AND PROPOSERS SHALL ACKNOWLEDGE, IN WRITING, RECEIPT AND INCORPORATION OF ALL ADDENDA AND CLARIFICATIONS IN THEIR RESPONSE. FAILURE OF THE PROPOSER TO RECEIVE ADDENDA SHALL NOT RELIEVE THE PROPOSER FROM ANY OBLIGATION UNDER ITS PROPOSAL AS SUBMITTED. THE PROPOSER SHALL IDENTIFY AND LIST IN ITS PROPOSAL ALL ADDENDA RECEIVED AND INCLUDED IN ITS PROPOSAL; FAILURE TO DO SO MAY BE ASSERTED BY THE DISTRICT AS A BASIS FOR DETERMINING THE PROPOSAL NON-RESPONSIVE.

Page	Section	Original Information	Revised Information
		N/A	Pre-Proposal Conference Presentation delivered today via Zoom (November 18, 2024)



# Los Angeles Community College District

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RFP 24-08: BOND PROGRAM MONITOR  
LACCD PROPOSITIONS A, AA, AND MEASURES J, CC AND LA

November 18, 2024  
Pre-Proposal Conference

Host: Jason P. Cascio, MBA, Senior Procurement Specialist, LACCD  
Moderator: Stephen J. Densmore, LACCD Special Counsel

RFP Process –  
RFP Contact Person

**RFP Contact Info:**

**Jason P. Cascio, MBA**  
**Senior Procurement Specialist**  
**[CascioJP@LACCD.EDU](mailto:CascioJP@LACCD.EDU)**

**Dorothea Mc Farline**  
**Procurement Manager**



## RFP Process – Communication

Proposers shall ***not***, prior to Award, contact or communicate, either verbally or in writing, with any of the following persons (other than the person named above) for the purpose of discussing the requirements of the RFP Documents or the RFP process: (1) **any trustee, officer, employee, or representative of the District;** or (2) **any consultant, or employee of a consultant, providing the District with assistance, advice, or professional services** relating to the matters covered by the RFP Documents or who is involved in any aspect of the RFP evaluation or scoring processes. Unauthorized communication by a Proposer in violation of the foregoing may result in disqualification.



## Board Policies

# *Board Policies*



# ***Board Policies***

## ***Chapter 6, Policy 6740***

### ***Bond Program Monitor***

Retention of Bond Program Monitor  
Reporting (General, Executive, Quarterly)  
Powers and Duties  
Whistleblower Hotline  
Investigative Reports and Other Documentary Material  
Duty of Vigilance and Cooperation  
Retaliation Prohibited  
Referrals of Investigations  
Conflicts of Interest  
Legal Counsel  
Internal Principles, Policies, and Procedures  
Auditing and Management Functions

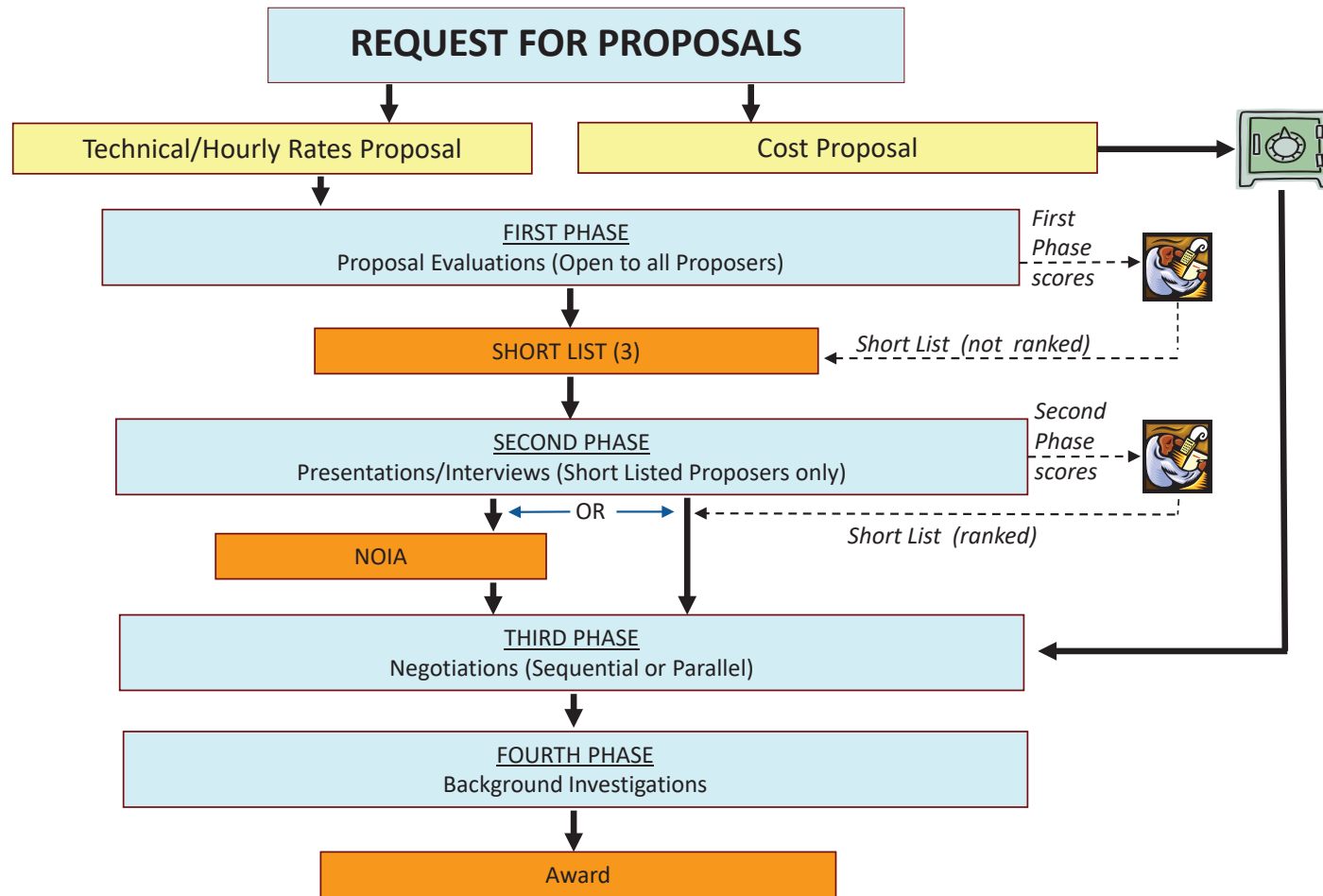


# RFP Process

## *RFP Process*



# Procurement Schematic





**First Phase**  
***Technical Proposals***



# RFP Process – Technical / Hourly Rates Proposals

## **Overview\***

***Organizational Structure***

***Organizational Capacity***

***Personnel Qualifications***

***Firm Experience***

***LSEDV Status***

***Claims History***

***Financial Information***

***Technical Approach***

***Hourly Rates***

\* RFP Attachment No. 3



RFP Process –  
Technical / Hourly Rates Proposals

**Organizational Structure**





## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Business legal entity***
- ***General business information***
- ***Office locations***

RFP Process –  
Technical Proposals

**Organizational Capacity**





## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Business history***
- ***Platform capacity***
- ***Personnel availability***

RFP Process –  
Technical / Hourly Rates Proposals

**Personnel Qualifications**



## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Key personnel (e.g., BPM, Deputy BPM, Senior Examiner, Senior Investigator)***
- ***Minimum qualifications***
- ***Preferred qualifications***
- ***Working knowledge of public bidding***
- ***Experience in public building programs***
- ***Subconsultants***
- ***References (BPM, Deputy, Subs/Up to 3)***





RFP Process –  
Technical / Hourly Rates Proposals

**Firm Experience**



## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Public agency oversight***
- ***Notable achievements***
- ***Performance evaluations***
- ***Project references***



RFP Process –  
Technical / Hourly Rates Proposals

**LSEDV Status**



## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Current Proposer status***
- ***Definitions: District Admin. Proc. 6330***
- ***RFP Attachment No. 3, Sec. 1.4***
- ***Statement of factual support***



RFP Process –  
Technical / Hourly Rates Proposals

**Claims History**





## RFP Process – Technical /Hourly Rates Proposals

### **Focal Points:**

- ***Proposer, Key Person and Professionals***
- ***Restate each question***
- ***Answer “Yes” or “No”***
- ***Incident explanation***

RFP Process –  
Technical / Hourly Rates Proposals

**Financial Information**





## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Audited Financials***
- ***Compiled, reviewed or attested***
- ***Other financial information***
- ***Proposing entity only***



RFP Process –  
Technical / Hourly Rates Proposals

**Technical Approach**



## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Strategic Plan***
- ***Organization Chart***
- ***Audit Process***
- ***Investigation Process***
- ***Complaints and Tips***
- ***Work Plan (RFP Attach. No. 2, Sec. 3.4)***
- ***Code of Conduct***



RFP Process –  
Technical / Hourly Rates Proposals

**Contract Hourly Rates**



## RFP Process – Technical / Hourly Rates Proposals

### **Focal Points:**

- ***Key Personnel, Prof. Staff, Support Staff***
- ***Each of 5 years***
- ***“All-in” rates***
- ***Scoring: Combined Blended Rate for (BPM, Deputy, Sr. Professionals)***
- ***50 point differentiation scale***



## RFP Process – Cost Proposals

# *Cost Proposals*



## RFP Process – Cost Proposals

### **Focal Points:**

- ***Separately packaged***
- ***Unopened until Third Phase/Not scored***
- ***6-month transition & first 12 months***
- ***Proposed Staffing Plans***
- ***Proposed Fee Maximums (not fixed)***
- ***Monthly breakdowns***
- ***Reimbursables not included***
- ***Prices subject to negotiation***



## RFP Process – Short-Listing

# *Short-Listing*



# RFP Process – Short-Listing



## Primary Evaluative Factors and Weighting

	<b>First Phase Evaluations–Primary Factors</b>	<b>Maximum Points</b>
1.	Qualifications and Experience	255
2.	Technical Approach	280
3.	Claims History	40
4.	LSEVD Status	100*
5.	Price (Competitive Blended Rate)	275
6.	Overall Proposal Quality	50
	<b>First Phase Total:</b>	<b>1,000</b>

- \* A full 100 points are automatically assigned to a Proposer that qualifies as a local, small, emerging or disabled veteran owned business as defined in Administrative Procedure 6330. Other businesses receive a score of zero (-0-).



# RFP Process – Short-Listing



### Evaluative Sub-Factors and Weighting

	First Phase–Primary & Sub-Factors	Sub-Factors (Max. Points)	Primary Factors (Max. Points)
1.	<b>Qualifications and Experience .....</b>		<b>255</b>
	Sub-Factor: Proposer’s firm qualifications and experience	128	
	Sub-Factor: Key Personnel qualifications and experience	127	
2.	<b>Technical Approach .....</b>		<b>280</b>
	Sub-Factor: Each Required Technical Element (7)	7 x 40 pts.	
3.	<b>Claims History .....</b>		<b>40</b>
	Sub-Factor: Termination	10	
	Sub-Factor: Bidding	10	
	Sub-Factor: Litigation	10	
	Sub-Factor: Other	10	
4.	<b>LSEDEV Status .....</b>		<b>100*</b>
5.	<b>Price (Competitive Blended Rate).....</b>		<b>275</b>
6.	<b>Overall Proposal Quality.....</b>		<b>50</b>
	<b>First Phase Total: .....</b>		<b>1,000</b>

\* A full 100 points are automatically assigned to a Proposer that qualifies as a local, small, emerging or disabled veteran owned business as defined in Administrative Procedure 6330. Other businesses receive a score of zero (-0-).

## RFP Process – Short-Listing

Three highest scores.

Rankings will not be  
released at end of First Phase.



**Second Phase**  
***Presentations/Interviews***



## **Key Elements**

- ***Short-listed proposers only***
- ***BPM, Deputy, Sr. Examiner, Sr. Investigator***
- ***RFP Schedule: January 27- 29, 2025***
- ***Scripted Questions – TBD***
- ***Allotted time (including Q&A): approx. 90 minutes***



# RFP Process – Presentations



## Primary Evaluative Factors and Weighting

	<b>Second Phase Evaluations–Primary Factors</b>	<b>Maximum Points</b>
1.	Presentation Opening	200
2.	Responses to Questions (scripted and non-scripted)	200
3.	Overall Communication/Interpersonal Skills	200
4.	Overall Demonstrated Knowledge	200
5.	Overall Performance	200
	<b>Second Phase Total:</b>	<b>1,000</b>



## RFP Process – Overall Weighting – First & Second Phases

First Phase: 60%

Second Phase: 40%

## RFP Process – Negotiations

# *Third Phase* *Negotiations*



## RFP Process – Negotiations

### **Focal Points:**

- ***Negotiations optional***
- ***Begins with highest-ranked Proposer***
- ***Sequential or Parallel***
- ***Negotiated Basic Fee Maximums  
(Initial 6-months and each 12 months  
of 5-year Term)***





## RFP Process – Background Check

# **Fourth Phase** **Background Check**





## RFP Process – Background Check

- **When**: *Background checks are conducted after Notice of Intent to Award or Negotiate*
- **What**: *Sign and submit Consent forms (RFP Attach. No. 13) after NOITA. Nothing to submit with Proposals*
- **Who**: *Any personnel with access to confidential info.*
- **Other**: *Intended awardee shall submit, within 5 business days of request, all information required by RFP Attach. No. 3, Part 4 (pp. 22 – 25)*

# RFP Process – Background Check

## **Professional Services** **Agreement**



# RFP Process – Professional Services Agreement

## **Key Focal Points:**

- ***RFP Attachment No. 1***
- ***Consultant Compensation (Art. 3)***
- ***Insurance (Art. 6)***
- ***Description of Services (Agree., Exhibit “A”)***



## RFP Process – FAQs

### FAQs:

**Q: How do I package my Proposals?**

**A: Separate packages, one box (See RFP Instructions, Art. 5 and RFP Attachment No. 3, Sec. 1.0)**

**Q: What price/cost information is in each package?**

**A: Technical/Hourly Rates Proposal includes only proposed Contract Hourly Rates. All other price/cost/staffing plan information is in the Cost Proposal.**

**Q: What professional services are covered by maximum compensation limits?**

**A: Basic Services only are covered. Additional Services and Reimbursables are not covered.**



# RFP Process – FAQs

## FAQs:

**Q: What positions may be filled by Subconsultants?**

**A: Any position other than Bond Program Monitor and Deputy Bond Program Monitor (RFP Instruction, Sec. 4.6.4)**

**Q: What if I have questions?**

**A: Submit Request for Information per RFP Instructions, Sec. 4.2. In part, “Requests for Clarification must be in writing and shall be delivered by e-mail, with the subject label “Request for Clarification on RFP 24-08” by 5:00 pm, November 26, 2024 to:**

**Mr. Jason P. Cascio  
Senior Procurement Specialist  
CASCIOJP@LACCD.EDU.”**

**Q: How will I know what there is an RFP Addendum?**

**A: Posted on District Website. No individual notice is given of issuance. (RFP Instructions, Sec. 4.3)**

**Q: What if I have a concern about a provision of the Agreement?**

**A: Submit questions, concerns or objections by means of Request for Clarification (RFP Instructions, Sec. 7.2)**



## RFP Process – FAQs

### FAQs:

**Q: What are the insurance requirements?**

**A: See Agreement, RFP Attachment No. 1, Art. 6**

**Q: Are there limits on the lengths of my Proposals?**

**A: Yes. See RFP Attach. No. 3, Sec. 1.0.4**

**Q: Is financial information scored?**

**A: No.**

**Q: May I use financials of a parent company?**

**A: No.**

**Q: Is my financial information confidential?**

**A: Proposals are confidential subject to disclosure under the Public Records Act (PRA). Claims of exemption from the PRA must comply with RFP Instructions, Sec. 2.4.13.**



## RFP Process – FAQs

### FAQs:

**Q: May I discuss the RFP process with LACCD personnel or Board members?**

**A: Absolutely not. See RFP Instructions, Sec. 4.6.7. All communications are to be exclusively through the RFP contract person (see next slide). Unauthorized communication during the RFP process, may lead to consequences including, but not limited to, immediate disqualification of the proposer from this procurement.**

**Q: Do I have to do everything, exactly as the RFP requires or states?**

**A: Any deviation from the RFP requirements is at the risk of the Proposer and may result in disqualification.**

**Q: Must the Proposals be verified?**

**A: A Verification form (RFP Attach. No. 12) must be signed and submitted each of the Technical/Hourly Rates Proposal and Cost Proposal.**

**Q: Is there a comprehensive list of what I need to include in my Proposals?**

**A: Yes. See RFP Instructions, Sec. 5.1.3**





RFP Process –  
RFP Contact Person

**RFP Contact Person:**

***Jason P. Cascio, MBA  
Senior Procurement Specialist  
CascioJP@LACCD.EDU***



# RFP Process – RFP Schedule

<i>RFP MILESTONE</i>	<i>DATE / DEADLINE</i>
<b>Issuance of Request for Proposals:</b>	Friday, October 18, 2024
<b>Pre-Proposal Conference:</b>	Monday, November 18, 2024
<b>Clarifications/Questions Deadline:</b>	Tuesday, November 26, 2024 5:00 pm
<b>Pre-Proposal RFP Addenda Issuance Deadline:</b>	Thursday, December 5, 2024
<b>Pre-Submission Objections Deadline:</b>	Thursday, December 5, 2024
<b>Questions and Answers posted on Website:</b>	Friday, December 6, 2024
<b>Proposal Submission Deadline:</b>	<b>Monday, January 6, 2025 2:00 pm</b>
<b>Announcement of Short-Listed Proposers:</b>	Friday, January 24, 2025
<b>Presentations/Interviews with Proposers:</b>	Monday, January 27 – 29, 2025
<b>Negotiations (optional):</b>	Friday, January 31, 2025
<b>Notice of Intended Award:</b>	Friday, February 7, 2025
<b>Background and Reference Checks:</b>	Monday, February 24, 2025
<b>Award</b>	Wednesday, March 5, 2025 Board of Trustees Meeting



## DISCLAIMER

*Summaries and other information provided at the Pre-Proposal Conference relating to the requirements of the RFP Documents are for the convenience of the proposers and are not binding upon the District unless and until confirmed by RFP Addendum. Statements by the District's representatives or attorneys, including, without limitation, statements or responses contained in RFP Addenda, do not constitute and should not be relied upon as legal advice or binding interpretations of the RFP documents or requirements.*

