



LOS ANGELES COMMUNITY COLLEGE DISTRICT

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

**REQUEST FOR PROPOSAL (RFP) NO. 24-12
BROKER OF RECORD - EMPLOYEE HEALTH AND WELFARE
BENEFITS**

RFP PROPOSED SCHEDULE

RFP Posted	Tuesday, November 12, 2024
Questions regarding this RFP submitted to District by 2:00 pm PST	Tuesday, December 17, 2024
Questions and Answers posted to Website	Friday, December 27, 2024
Proposer Responses Due by 2:00 pm PST	Wednesday, January 8, 2025
Interviews with Proposers	Monday, February 3, 2025 through Friday, February 7, 2025
Tentative Award Date	Wednesday, February 12, 2025
Board Date for Approval	Wednesday, March 5, 2025

**Procurement Unit
770 Wilshire Boulevard, 6th Floor
Los Angeles, CA 90017-3719
213.891.2301**



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1. INTRODUCTION

1.1. Purpose of Request For Proposal (RFP)

The purpose of this Request for Proposal (“RFP”) is to solicit proposals of a highly qualified firm to provide employee health and welfare benefits insurance brokerage services for the Los Angeles Community College District (“District”).

Insurance brokerage services shall be provided on a fixed-fee basis for a period of three years, with two (2) one-year options to renew for a maximum total duration of five (5) years contract to provide comprehensive services for the District. Once under contract, matters may be assigned based upon expertise, particular skills and successes of the firm, financial considerations, and proposed strategies.

This RFP and all subsequent modifications thereto are hereby designated as the sole reference and authority for the preparation of proposals.

The competitive method used for this solicitation is a Request For Proposal (RFP). Selection of a successful firm or firms (alternately referred to as "Proposer" in this RFP) will be made through competitive procurement procedures, which will include factors discussed in Section 3 of this RFP.

This RFP shall not be construed (1) to create an obligation on the part of the District to enter into a contract with any firm or (2) to serve as the basis of a claim for reimbursement of expenditures related to the development of a proposal. Proposers shall be solely responsible for any expenses incurred as a result of its submittal under this RFP.

The District does not guarantee any specific dollar volume of business with the successful proposer(s) as a result of awarding any contract(s) based on this RFP.

An annual evaluation will occur by LACCD to assess performance and outcomes by the provider(s) regarding the quality and effectiveness of the services and materials provided.

1.2. About the District

The District was organized in 1969 and is governed by an elected Board of Trustees and is part of the statewide California Community College system. Members of the Board of Trustees are elected at large to serve four-year terms. LACCD serves a highly diverse, multi-racial, and multi-lingual geopolitical area of approximately five million people in 2023 in roughly 900 square miles of the County of Los Angeles, including 36 cities and unincorporated communities, including the City of Los Angeles. The District extends from the San Fernando Valley and Sylmar areas north of metropolitan Los Angeles, down to the



Port of Los Angeles in the south; from the “west side” of Los Angeles, over to the eastern side of Los Angeles into Boyle Heights and the San Gabriel Valley.

The District’s nine colleges provide comprehensive, lower-division general education (the traditional first two years of a four-year degree) for transfer; education pathways for two-year certificates or Associate’s degrees; occupational education; credit and non-credit instructional programs and Adult Education to meet the needs of the surrounding communities; Career Education and Strong Workforce jobs training education; citizenship classes; and, in some instances, four-year Bachelor’s degree programs and other lifelong learning opportunities. The colleges receive accreditation, subject to renewal, from the Accrediting Commission for Community and Junior Colleges (ACCJC).

The nine colleges are: Los Angeles City College, East Los Angeles College, Los Angeles Harbor College, Los Angeles Mission College, Los Angeles Pierce College, Los Angeles Southwest College, Los Angeles Trade-Technical College, Los Angeles Valley College and West Los Angeles College and all are fully accredited. The satellite locations are: Van de Kamp Innovation Center located in Atwater Village, the South Gate Education Center in the City of South Gate, and an administrative building located near East Los Angeles College identified as the Corporate Center in Monterey Park, and the District Administrative Offices known as the Educational Services Center in downtown Los Angeles. The colleges range in size from about 22 acres (Los Angeles Trade-Technical College) to more than 450 acres (Los Angeles Pierce College). Facilities include newly constructed classroom and instructional laboratory buildings, learning resource centers (libraries with specialized learning/tutoring centers) as well as original instructional buildings, parking structures, maintenance yards, athletic fields, and gymnasiums. Some of the colleges, like Los Angeles Trade-Technical College, founded in 1925, pre-date the District and were brought into the District. Others were created and built as the District expanded to its current configuration.

The District’s 2023-2024 Fiscal Year budget, found online, [here](#), is from all funds and sources is \$10.4 billion, of which \$8.5 billion is for the District’s capital improvement and construction program, “BuildLACCD.” In Fall 2023 the District employed more than 6,200 full-and part-time personnel and served over 170,000 full-and part-time students in the 2022-23 academic year. More information about the District and its colleges can be found online, [here](#). The student population of the LACCD is ethnically diverse with 60 percent Hispanic/Latinx, 16 percent White, 9 percent African American, 8 percent Asian, and 2 percent Multi-Ethnic. More detailed information about LACCD students can be found online, [here](#). In the 2022-23 Academic Year, the District conferred nearly 35,000 awards to students, including two-year degrees, degrees for transfer, and credit and non-credit certificates of achievement.

The District maintains an active free-tuition program, the Los Angeles College Promise (LACP), available to all first-time, full-time students, regardless of age, race/ethnicity, or demographic background. Since its inception in 2017, over 30,000 students have participated in this program and about 7,500 LACP students are enrolled in LACCD colleges in the 2022-2023 academic year.



2. SCOPE OF SERVICES & PROPOSED TERM OF CONTRACT

2.1. Scope of Services

Please refer to [Appendix A: Scope of Services](#).

2.2. Term of Contract

All contracts awarded pursuant to any part of this RFP solicitation shall be effective for a period of three years, with two (2) one-year options to renew for a maximum total duration of five (5) years, from which services may be contracted. Said options will be exercised upon satisfactory performance and by written consent at the sole and absolute discretion of the District.

The District does not guarantee any specific dollar volume of business with the successful proposers as a result of awarding any contracts based on this RFP. Rather, the contracts will be based on an approved initial “not to exceed” annual expenditure (to be determined) as approved by the LACCD Board of Trustees. The “not to exceed” limits can be adjusted higher if a demonstrated need occurs.

A quarterly evaluation will occur by LACCD to assess performance and outcomes by each provider regarding the quality and effectiveness of the services and materials provided. As the end of the original two-year contract term nears, the District will determine, at its discretion, the potential exercise of the option years.

3. GENERAL INFORMATION AND GUIDELINES

3.1. District Contact Person

Emily Yuen
Senior Procurement Specialist
Los Angeles Community College District
Procurement Unit, 6th Floor
770 Wilshire Boulevard
Los Angeles, CA 90017-3719
email: yued@lacc.edu

3.2. Internet Access to this RFP

All materials related to the RFP are available on the internet, and can be found [here](#).



A Proposer who chooses to download an RFP solicitation will be responsible for checking the aforementioned website for clarifications and/or addenda. Failure to obtain clarifications and/or addenda from the website shall not relieve Proposer from being bound by any additional terms and conditions in the clarifications and/or addenda, or from considering additional information contained therein in preparing your Proposal.

Note: There may be multiple clarifications and/or addenda. Any harm to the Proposer resulting from such failure shall not be valid grounds for a protest against award(s) made under the solicitation.

All Proposers are responsible for obtaining all RFP materials.

3.3. Unauthorized Communications

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.

3.4. Interested Parties

Providers who are advisors to the District in respect to the RFP process are not allowed to submit, or participate in submission of, Proposals. A Proposer shall not participate in, or be “interested in,” more than one Proposal. For purposes of this paragraph, “interested in” means having a managerial or financial interest in another Proposer or a Subcontractor to another Proposer. Notwithstanding the foregoing, a Subcontractor may be proposed as a subcontractor to more than one Proposer.

3.5. Proposer Clarifications

Without limitation to the District’s rights relating to the conduct and content of Negotiations, the District reserves the right, but assumes no obligation to, at any point in the RFP process to contact a Proposer directly, without notice to other Proposers, for purpose of obtaining clarifications of, or to address minor irregularities, informalities, or apparent clerical mistakes in, a Proposal (“Proposer Clarifications”). Where the District determines that there is a need and justification for seeking Proposer Clarifications, the District may request Proposer Clarifications from some Proposers and no other Proposers. If Proposer Clarifications are sought from all Proposers, the questions asked may be different for each Proposer.

3.6. False Information



In addition to and without limitation upon any other requirements of the RFP Documents, the District reserves the right, but assumes no obligation, to disqualify any Proposer and reject any Proposal should District determine that any information submitted by the Proposer is false, incorrect, or materially incomplete.

3.7. District Confirmation

The District reserves the right, but assumes no obligation, to confirm through any means available to the District the truth, accuracy, or completeness of any information contained within the resumes or other information submitted by a Proposer or communicated by a Proposer or a Subcontractor during face-to-face communications with the District or its representatives or consultants administering the RFP process.

3.8. No Joint Offers Accepted

Where two or more Proposers desire to submit a single proposal in response to this RFP, they should do so on a prime/subcontractor basis rather than as a joint venture or informal team. For this engagement, District intends to contract with individual provider(s) and not with multiple providers doing business as a joint venture. Accordingly, where two or more providers desire to join in preparing and submitting Proposals, they should do so on a prime-subcontractor basis, rather than as a joint venture or informal team. The provider acting as the “prime”, if it receives the Award, will enter into the Agreement with the District.

3.9. District Determinations

The District shall have the right to make all determinations and interpretations relating to the RFP Documents or the RFP process, including, without limitation, any Proposer’s compliance with the RFP Documents or its qualifications to participate in the RFP process, and all such determinations shall be final and binding.

4. INSTRUCTIONS AND GENERAL CONDITIONS

This RFP contains the instructions and conditions governing the requirements for a proposal to be submitted by an interested Proposer, the format in which the proposal is to be submitted, the material to be included therein, and the requirements that must be met. Each Proposer should carefully examine the entire RFP and be fully aware of the nature and quality of the services sought by District as well as the conditions for providing such services.

PROPOSALS MAY BE REJECTED AS NON-RESPONSIVE IF THE PROPOSER FAILS TO FULLY COMPLY WITH ANY OR ALL OF THE INSTRUCTIONS OR CONDITIONS SET FORTH IN THIS RFP.



4.1. RFP Schedule

RFP SCHEDULE	
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The District reserves the right, at any time to make adjustments in the form of additions, modifications or deletions to the RFP schedule. Such adjustments, if any shall be made by RFP Addendum. References in the RFP Documents to the RFP Schedule or to date in the RFP Schedule shall mean the RFP Schedule as so adjusted.

4.2. Proposal Submission

The proposer shall submit to the District one (1) printed original and seven (6) copies of its proposal, together with one (1) copy of a USB drive containing an electronic version of the proposal in Microsoft Word format, addressing each of the items in this RFP and must be received by the District no later than **2:00 p.m. on Wednesday, January 8, 2025**. Proposals are to be enclosed in a sealed package displaying the proposer’s name, California Secretary of State Certificate of registration/Entity File number, and the words: “PROPOSAL RESPONDING TO RFP 24-12: BROKER OF RECORD - EMPLOYEE HEALTH AND WELFARE BENEFITS”.

Mail or deliver proposals to:
Los Angeles Community College District
770 Wilshire Blvd, 6th Floor
Los Angeles, California 90017
ATTN: Emily Yuen, Senior Procurement Specialist



Submittals not conforming to the specifications of this RFP may be deemed non-responsive or result in points being deducted during evaluation.

Proposals must be received by **2:00 p.m., PST on Wednesday, January 8, 2025**. Any proposals received after the time and date above may at the District's sole discretion of the District, be returned unopen or set aside without consideration.

Delivery of the proposal by the specified deadline is the sole responsibility of the Proposer to ensure that its proposal is delivered on time. If hand delivered, ample time should be scheduled for delays caused by downtown Los Angeles area traffic and parking.

District does not provide parking accommodations to proposers submitting proposals.

The District shall not be responsible for, nor accept as a valid excuse for late proposal receipt, any delay in mail service or other method of delivery used by the Proposer except where it can be established that the District was the sole cause of the late receipt.

Proposals submitted via fax, telephone or email will not be accepted.

All proposals are offers subject to acceptance by District and may not be withdrawn for a period of 180 calendar days following the Proposal Submission Deadline. Proposals may not be amended once submitted to District, except as permitted by District.

4.3. Meeting RFP Specifications Identified in Scope of Services

The services offered by the Proposer must meet the specifications as described in this RFP. The District reserves the right to reject as non-responsive any proposal that does not meet the specifications as described in this RFP.

4.4. Proposed Information Must Be Accurate, Complete and Valid

The Proposer must provide information including, but not limited to, fees for all offered services based on the scope of services, which is set forth in [Appendix A: Scope of Services](#).

Failure to do so may invalidate the proposal. The price must be accurate, complete, and valid for the term of the agreement. The Proposer is responsible for the accuracy of the proposal submitted, and no allowance will be made for error or fee increases that the Proposer later alleges are retroactively applicable.

4.5. Authorized Signatures

Exhibits A through G (Exhibit H excluded) must all be signed by the Proposer's authorized signatory and must be submitted by the Proposer in the sealed envelope along with its proposal. The District is unable to



accept any proposal submitted without these statements completed and signed by the Proposer’s authorized signatory.

4.6. Authorization to Do Business

All Proposers must be authorized to do business in California. If a Proposer is a sole proprietorship or partnership, the Proposer should furnish with its proposal a copy of a current business license issued in California. If the Proposer is a corporation, it must be approved by the California Secretary of State to do business in California as shown by it having an “**ACTIVE**” status listed on the California Secretary of State website as of the date of submission of the proposal. The Proposer shall provide the corporate number issued by the Secretary of State with its proposal.

Each Proposer is required to possess at the time of submitting its Proposal, and at all times during the RFP process (and, in the case of the Proposer that receives award, at the time of award, upon execution of the Agreement, and at all times during performance of the Agreement) any licenses required by Applicable Law for the performance of the Agreement.

4.7. Requirements

The Proposer shall be responsible for becoming familiar with the scope of services required by the District as set forth on pages of this RFP, and shall rely solely upon his or her own independent judgment, and not upon any statements or representations made by the District, whether express or implied. The failure or omission of any Proposer to acquaint himself or herself with the service requirements of the District shall in no way relieve any Proposer from any obligation with respect to this proposal or to the resulting agreement. The submission of a proposal shall be taken as *prima facie* evidence of compliance with this section.

4.8. Questions about RFP

Questions must be submitted in writing by email to Emily Yuen, Senior Procurement Specialist, at email address: yueded@laccd.edu on or before **2:00 p.m. Pacific Time, Tuesday, December 17, 2024**. Please include “**RFP 24-12 – Questions for BROKER OF RECORD - EMPLOYEE HEALTH AND WELFARE BENEFITS**” in the subject line.

Proposers should submit all questions in writing by the deadline for questions. LACCD shall not be obligated to answer any questions received after the above deadline or submitted in a manner other than as instructed above.

Written responses will be posted on the Los Angeles Community College’s website, [here](#).



Proposers are instructed not to contact District personnel or its agents in any other manner concerning this RFP. Unauthorized contact, at LACCD's sole discretion, will be grounds for disqualification of a proposer.

4.9. RFP Addenda

If it becomes necessary for District to revise any part of this RFP or to provide clarification or additional information after the proposal documents are released, written addenda will be posted online, [here](#).

It shall be the responsibility of the Proposer to check the website or to appropriately inquire with District for any addenda issued. All addenda issued by DISTRICT shall become part of the RFP and the Proposer shall acknowledge, in writing, receipt and incorporation of all addenda and clarifications in its response. Specifically, Proposer's acknowledgement of the addenda must be declared in the proposal in Exhibit D.

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. The Proposer's failure to identify and list in its proposal all addenda received and included in its proposal may be asserted by the District as a basis for determining a proposal as non-responsive.

4.10. Interpretation of Documents

If any person contemplating submitting a proposal for the services proposed herein is in doubt as to the true meaning of any part of the proposal documents, or finds discrepancies in, or omissions from the documents, he/she may submit to the District a written request for an interpretation or correction thereof. The person submitting the request will be responsible for its prompt delivery. Any interpretation or correction of the proposal documents will be made only by addendum duly issued and a copy of such addendum will be mailed or delivered to each person receiving a set of the proposal documents. No person is authorized to make any oral interpretation of any provision in the proposal documents to any Proposer, and no Proposer is authorized to rely on any such unauthorized oral interpretation.

4.11. Withdrawal/Proposal Irrevocable for 180 Days

A Proposer may withdraw its proposal at any time prior to the submittal deadline by sending the District a request in writing from the same person who signed the submitted proposal. As of the deadline for submittal, any proposal received by the District and not withdrawn becomes an irrevocable offer available for acceptance by the District immediately and for **one hundred and eighty (180)** days thereafter. The Proposer is responsible for the accuracy of the proposal submitted, and no allowance will be made for errors or price increases that the Proposer later alleges are retroactively applicable.



4.12. Exemption from Disclosure

Proposals will remain confidential in their entirety until the evaluation and analysis process is complete and a recommendation of an award has been approved by the LACCD Board of Trustees or if no award is made, then when the RFP has been public withdrawn. All proposals submitted will become the property of the LACCD. The Proposer must identify, in writing, all copyrighted material, trade secrets, or other proprietary information that the preparer claims are exempt from disclosure under the Public Records Act (California Government Code Section 6250 et seq.). Any Proposer claiming such an exemption must also state in the proposal that “the provider agrees to indemnify and hold harmless the Los Angeles Community College District, its Board of Trustees, Los Angeles City College, East Los Angeles College, Los Angeles Harbor College, Los Angeles Mission College, Los Angeles Pierce College, Los Angeles Southwest College, Los Angeles Trade-Technical College, Los Angeles Valley College, West Los Angeles College, and its officers, employees and agents, from any claims, liability, or damages against, and to defend any action brought against above said entities for their refusal to disclose such material, trade secrets, or other proprietary information by any party.” Failure of a proposal to include such a statement will be deemed a waiver of any exemption from disclosure under the California Public Records Act. A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by the District. The Proposer’s identification of a document as “proprietary” or “confidential” does not automatically confer exclusion from disclosure under the California Public Records Act.

4.13. Pre-Contractual Expenses

Pre-contractual expenses are defined as any expenses incurred by the Proposer to:

(1) Prepare its proposal in response to this RFP; (2) Submit that proposal to District; (3) Negotiate with District on any matters related to this RFP, including a possible contract; and (4) Engage in any other activity prior to the effective date of award, if any, of a contract resulting from this RFP. District shall not, under any circumstance, be liable for any pre-contractual expenses incurred by Proposers. All expenses including, but not limited to, pre-contractual expenses incurred by the Proposer in preparing the proposal shall be borne and paid for solely by the Proposer and shall not be included in their offers.

4.14. Subcontractors

Proposers are permitted to provide for a portion of the Basic Services to be performed by one or more consultants or contractors retained by the Proposer (collectively, “subcontractor”) provided that each subcontractor proposed to be used is identified in the Proposal by name, contact person, telephone number, email address, and a description of the portion of Basic Services to be performed by the subcontractor.

4.15. Immaterial Defect in Proposal



The District may waive any immaterial deviation or defect in a proposal. The District's waiver shall in no way modify the RFP documents or excuse the Proposer from full compliance with the RFP if awarded the contract.

4.16. Oral Communications

Any oral communication by the District Contact Person or his/her designee regarding this RFP is not binding and shall in no way modify the RFP or the obligations of the District, Proposer and/or Contractor.

4.17. RFP as Part of Final Contract

At the District's discretion, the content of this RFP may be incorporated into the final contract.

4.18. Proposed Contract

The Proposer(s) selected for contract award(s) through this RFP shall be required to enter into a written agreement with the District. The Standard Agreement for professional services presented in Exhibit H of this RFP is the contract proposed for execution. It may be modified to incorporate other pertinent terms and conditions set forth in this RFP, including those added by addendum, and to reflect the Proposer's offer or the outcome of contract negotiations, if any.

Exceptions and requested changes to the terms and conditions of the Standard agreement, or the Proposer's inability or unwillingness to comply with any of the provisions of the Standard Agreement, must be declared in the proposal and will be considered as part of the proposal evaluation process.

4.19. Exceptions/Deviations

Any exceptions to, deviations from, or inability to comply with the requirements set forth in this RFP, or the terms and conditions contained in the Professional Services Agreement, must be declared in writing in Exhibit E within the proposal; and failure to do so will prevent Proposer from asserting its inability to comply with the terms or conditions later on. **Such exceptions or deviations must be segregated as a separate element of the proposal under Exhibit E - "Exceptions and Deviations to Professional Services Agreement."** The District will make a good faith effort to consider contractual issues identified by providers and District requires all proposing providers to similarly make a good faith effort to comply with the District's sample agreement terms and conditions.

Proposals that mandate the use of provider standard services contract, rather than utilizing the District's standard services contract will result in those providers' proposals being judged non-responsive and these proposals will be rejected.

Proposals that reject the following integral provisions of the District's contract terms and conditions will be treated as a rejection of the District's contract and these proposals will be rejected.



Section 5	Term of Agreement
Section 14	Family Educational Rights Privacy Act (FERPA)
Section 18	Governing Law
Section 19	Non-Discrimination
Section 22	Board Authorization
Section 27	Requirements for Federally-Funded Contracts
Section 28	Accessibility Requirements

Exceptions or deviations which are in conflict with the District's terms and conditions may render the proposal non-responsive. In the event that exceptions and deviations to the Professional Services Agreement are requested after the contract has been awarded, the District may deem the proposal non-responsive and may disqualify the proposal at its discretion.

4.20. No Commitment to Award

Issuance of this RFP and receipt of proposals does not commit District to award a contract. District expressly reserves the right to postpone proposal opening for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one provider concurrently, or to cancel all or part of this RFP.

4.21. No Agreement Until Signed

No agreement with the District is effective until both parties have signed a contract and the District's Board of Trustees has authorized the contract.

4.22. News Releases

News releases pertaining to any award resulting from this RFP may not be made without the prior written approval of the District.

4.23. Use of District Employee's Names

The successful Proposer must agree not to use the names, office phone numbers, email addresses, and/or addresses of District employees for any purpose not directly related to this RFP.

4.24. Adjustments to Contract

All adjustments shall be proposed in writing by the District for approval prior to becoming effective. All required contract amendment(s) shall be issued by the District.



4.25. Contractor Evaluation

Contractors (and their subcontractors, if applicable) will be evaluated periodically regarding their performance.

4.26. Termination or Cancellation

The District reserves the right to terminate any contract awarded through this RFP by providing thirty (30) days' written notice to the Contractor.

4.27. Protests

Any Proposer that has provided a proposal to the District may protest the solicitation or award of a contract for violations of "DISTRICT'S" procurement policies or of laws and regulations governing "DISTRICT'S" procurement activities, provided the proposer has complied with PP-04-09, Bid Protest and Appeals.

In order to be considered, all protests must be in writing and filed with and received by District, not more than five (5) business days following the date of issuance of the District's Notice of Intent to Award with the contact below. **Protests received by District after this date will be returned to the sender.**

The protest letter must state the basis for the protest and the remedy sought and should be addressed to:

Valencia M. Moffett
Director of Business Services or designee
Los Angeles Community College District
770 Wilshire Blvd, 6th Floor
Los Angeles, CA 90017

Failure to timely file the proposal protest shall constitute grounds for the District to deny the proposal protest without further consideration of the grounds stated therein.

4.28. Other District Rights

The rights, powers, and discretion expressly conferred upon the District under the RFP Documents are not intended to be exclusive but are cumulative and in addition to, and not a substitute for, every other right, power, or discretion existing or available to the District under the RFP Documents or Applicable Laws.

5. PROPOSAL FORMAT AND CONTENT



5.1. General

The proposal should provide a straightforward, concise description of the proposer's ability to satisfy the requirements of this RFP. Emphasis should be placed on conformance to the RFP instructions, on responsiveness to the RFP requirements, and on completeness and clarity of the proposal's content.

This RFP and the selected proposal response will become a part of any Agreement that is executed as a result of this RFP between the District and the Contractor. Any proposal attachments, documents, letters, and materials submitted by the proposer shall be binding and may be included as part of any final Agreement.

Each provider submitting a proposal must follow the instructions contained in this RFP in preparing and submitting its proposal. The proposing provider is advised to thoroughly read and follow all instructions. A proposal must contain all of the information in the order and format indicated below. All terms and conditions set forth in this RFP will be deemed to be incorporated by reference in their entirety into any response submitted by your provider.

Failure to comply with the rules/format set forth herein may result in rejection of the RFP response.

All proposals received and any information contained therein, are subject to disclosure in accordance with the California Education Code. Interested providers must respond to all of the questions listed below.

5.2. Required Format of Proposals

In order to adequately compare and evaluate proposals objectively, all proposals **must** be submitted in accordance with the format below.

Failure to comply with the rules/format set forth herein may result in rejection of the RFP response.

In your proposal, please respond to each question by repeating the question at the top of the section and referring to the question by the numbers used in this RFP.

Proposals are to be submitted in 8 1/2" x 11" size, typed in a font size no less than 12 and submitted in paper form, single-sided, bound with a simple method of fastening. Lengthy narrative is discouraged; presentations should be brief and concise and not include extraneous or unnecessarily elaborate promotional material.

Sections should be separated by labeled tabs and organized in accordance with subject matter sequence as set forth below. Each page of the Proposal must be numbered in a manner so as to be uniquely identified. Proposals must be clear, concise, and well organized.



Supplemental technical information, product literature, and other supporting materials that further explain or demonstrate Provider's capabilities may also be included as addenda to a submitted proposal.

Proposers should use the following outline in organizing the contents of their proposals (see details in Section 5.3.):

Cover Page

Transmittal Letter

Table of Contents

Specifications of Scope of Services

References

Appendices

Appendix A – Supporting Documents

Appendix B – Cost Proposal

Appendix C – Mandatory Documents to be Submitted in Response

Sections should be separated by labeled tabs.

Failure to comply with the rules/format set forth herein may result in rejection of the RFP response.

5.3. Cover Page

A cover page with the Proposer's name, the title, "RFP 24-12: BROKER OF RECORD - EMPLOYEE HEALTH AND WELFARE BENEFITS" and submission due date and time. The Proposer should provide the corporate number issued by the California Secretary of State. (Please see 4.6 Authorization to Do Business)

5.4. Transmittal Letter

The letter of transmittal must, at a minimum, contain the following:

- Identification of the offering vendor(s), including name, address email address and telephone number;
- An acknowledgement of RFP addendum and/or addenda, if any;
- Name, title, address, telephone number and email address of contact person during period of proposal evaluation
- A statement that the proposal shall remain valid for a period of not less than six (6) months, (180 days), from the due date for submittal



- Identification of any information contained in the proposal which the proposer deems to be, and establishes as, confidential or proprietary and wishes to be withheld from disclosure to others under the California Public Records Act

A blanket statement that all contents of the proposal are confidential or proprietary will not be honored by the District.

- Signature of a person authorized to bind the offering provider to the terms of the proposal
- Name and address of operating provider, names of owners or principals of provider. Also include a completed W-9.

5.5. Table of Contents

Immediately following the transmittal letter include a complete table of contents for material included in the proposal, including page numbers.

5.6. Response to Specifications of Scope of Services

A. Proposals and Related Experience

This section should establish the ability of the proposer to satisfactorily perform the required work by reasons of: demonstrated competence in the services to be provided; nature and relevance of similar work recently completed for other clients; record of meeting schedules and deadlines on other projects; competitive advantages over other firms in the same industry; strength and stability as a business concern; and supportive client references.

Specifically include:

Background information about your firm, including date of founding, legal form (sole proprietorship, partnership, corporation/state of incorporation), number and location of offices, principal lines of business, number of employees and other pertinent data. Disclose any conditions (e.g., bankruptcy or other financial problems, pending litigation, planned office closures, impending merger) that may affect your firm's ability to perform contractually. Certify that the firm and its principals are not debarred, suspended, or otherwise declared ineligible to contract by any federal, state, or local public agency, or declare and explain any such status.

B. Proposed Staffing and Project Organization

This section should discuss the staff of the proposing firm who would be assigned to work for LACCD. Demonstrate that the firm has professional personnel, by identifying the key individuals to perform under



contract with LACCD and by providing their resumes. Please indicate years of experience both on a firm and an individual basis.

- Identify the key personnel from your firm who would be assigned to the District. Include a brief description of their qualifications, professional certifications, job functions and office location(s). Designate a Senior-Level Account Executive or Project Manager who would be ultimately responsible for the District's account and an Account Manager who would provide day-to-day direction of the required work. Furnish brief resumes (not more than two pages long) for all key personnel; include these as an appendix, not in the body of the proposal.
- Include a simple organization chart, which clearly delineates communication and reporting relationships among the project account staff.
- State the other lines of business in which your firm is engaged.

The evaluation will consider amongst other factors length of practice, education, training, relevant experience and longevity with the firm.

C. Additional General Requirements for Proposal

RESERVED

D. Qualifications and Experience

Detail the Firm's experience including each team member's experience in providing the services listed in the RFP including Project Name, and Client Organization within the last 5 years.

Describe other contracts (at least 6, but no more than 10) similar in scope, size or discipline to the required services described herein, performed or undertaken within the past five years.

Provide references, including name, address and telephone number of a contact person for each project identified and described above. Indicate commencement dates, duration and type of operation.

Provide a list of your most recent higher education, large organization, Community Colleges and/or Community College District clients in the State of California.

E. Project Approach



Overview

This section should establish the Proposer's understanding of the District's objectives and requirements, demonstrate the Proposer's ability to meet those requirements and outline clearly and concisely the plan for accomplishing the specified work, as outlined in Exhibit A, Scope of Work.

Content

Describe succinctly how your firm would accomplish the work and satisfy the District's objectives described in this RFP. If appropriate, divide the work into segments or tasks to represent milestones for measuring progress.

Describe the work products and other deliverables you would provide the District at the conclusion of the engagement. State the purposes for which the work products could be used and any limitations your firm would impose on their usage.

Describe what information, documents, staff assistance, facilities or other resources you would require from the District to complete your work; declare any other critical assumptions upon which your work plan is based.

Attach as an appendix a sample insurance quote your firm prepared for a client of the size and complexity as Los Angeles Community College District. You may exclude propriety information regarding the client and information not otherwise available through the Public Records Act.

List all the names of the insurance companies that underwrite 30% or more of your firm's book of business.

F. Transition Plan

Overview:

This section should identify all the actions required to transition the District to the proposer's firm.

Content

Describe succinctly how your firm would accomplish transitioning the District to your firm. If appropriate, divide the work into segments or tasks to represent milestones for measuring progress.

Describe the degree of change required to your existing systems. The amount of new technology to be added to your portfolio. Also, include the plan to gather supporting documentation/ knowledge transfer from prior Broker.

5.7. References

See Section 5.6.D Qualifications and Experience.



5.8. Appendices to be Included in Proposal

1. **Appendix A** – Supporting Documents: Furnish as appendices those supporting documents (e.g., certificates of insurance, staff resumes; include a completed W-9, Request for Taxpayer Identification Number) requested in the preceding instructions.
2. **Appendix B** – Cost Proposal. Provide your Cost Proposal/Schedule of Fees. All Proposers are required to use Appendix B, Cost Proposal to be submitted with their Proposal. Proposals shall be valid for a minimum of 180 days following submission.

This section should disclose all charges to be assessed the District and to be generated from the District’s Scope of Work.

3. **Appendix C** – Mandatory Documents to be Submitted in Response
4. Completed and signed Non-Collusion Affidavit (Exhibit A)
5. Completed and signed Certificate of Non-Discrimination (Exhibit B)
6. Completed Confidentiality Agreement (Exhibit C)
7. Acknowledgement of all addenda issued by the District (Exhibit D)
8. Completed and signed Exceptions and Deviations (Exhibit E)
9. Completed and signed Russian Economic Sanctions Certification (Exhibit F)
10. Completed and signed Small, Local, Emerging Disabled Veterans (Exhibit G)

Proposers are cautioned, however, that this does not constitute an invitation to submit large amounts of extraneous material; appendices should be relevant and brief.

GRACE PERIOD FOR MISSING OR INCORRECT FILING OF EXHIBITS “A” THROUGH “H”:

In the event that a Provider fails to submit all or any part of items (a) through (h) above with its submission or if any submitted item is incomplete or incorrect, the Procurement Unit will notify the Provider and the Provider shall have an additional three (3) business days to submit the missing item to the Procurement Unit. Failure to submit the missing item will result in the disqualification of the Provider if the mandatory item is missing entirely. Failure to complete or correct a mandatory item will result in the Provider’s Proposal being considered in the form in which it was originally submitted. Failure to submit mandatory items after the grace period will result in the proposal being deemed non-responsive.



6. PROPOSAL EVALUATION AND CONTRACT AWARD

6.1 General

All proposals received in accordance with these RFP instructions will be evaluated to determine if they are complete and meet the requirements specified in this RFP. All terms, conditions, requirements, and procedures included in this RFP must be met for a Response to be determined responsive. If a Respondent fails to meet any material terms, conditions, requirements or procedures, its response may be deemed unresponsive and disqualified.

6.2 Evaluation Process

All proposals will be evaluated to determine if they are responsive. An Evaluation Panel consisting of LACCD staff and/or outside associates will review, analyze, and evaluate the written proposals received based on the Written Proposal Evaluation Criteria.

The top three firms who receive the highest scores on their written proposals will be invited to an interview. We anticipate the interviews will take place between **Monday, February 3, 2025 through Friday, February 7, 2025**.

Interviews will be held at the Educational Services Center or remotely through a virtual conference platform. Interviews will be scored using the Interview / Presentation Criteria listed below.

LACCD reserves the right to forego the interview stage as determined in its sole and absolute discretion. Final selection will be based upon the above factors, as well as the interview performance.

LACCD reserves the right to reject any or all proposals, to waive any irregularities or informalities in the offers received and to change the evaluation process described above if circumstances dictate this or it is otherwise in the best interests of LACCD to do such. In the event a proposal(s) is rejected, or in the event a proposer's offer is not rejected but does not result in a contract award, LACCD shall not be liable for any costs incurred by the proposer in connection with the preparation and submittal of the proposal.

6.3 Evaluation Criteria for Written Proposals

Proposals will be evaluated in accordance with your response to the criteria outlined in Appendix A: Scope of Services. Specifically, scores will be granted based upon the criteria listed on the chart below.

The following criteria will be used in the evaluation of written proposals. The relative weights of the criteria are based on a 100-point scale, as listed below.



WRITTEN PROPOSAL	
Criteria based on the required components of the proposal	Points possible
Qualifications, experience, references of Proposer, and ability to carry out the Scope of Work described in Appendix A of this RFP	20
Staffing and project organization	10
Work Plan/Technical Approach, including understanding of the RFP and scope of work, and expectations outlined in the RFP	20
Newsletters and Compliance Advising	10
Fees	25
Transition Plan	5
Small, Local, Emerging, Disadvantaged, Veteran (SLEDV)	10
TOTAL POSSIBLE POINTS	100

The scoring for fees will be objective. The offeror with the lowest reasonable fees will receive the maximum price points (25 points). All other proposals will receive a proportionately lower price score. The following formula will be used to determine each offer’s evaluated price score.

$$(\text{Lowest Price Proposal} / \text{Price of Proposal}) \times 25 \text{ points} = \text{Evaluated Price Score}$$



6.3.1. Evaluation Criteria for Interview / Presentations

If interviews/presentations are conducted, these will be evaluated by the LACCD Selection Committee against the factors specified below. The relative weights of the criteria are based on a 100-point scale and are listed below.

CRITERIA FOR INTERVIEW/ PRESENTATION	Points Possible
Presentation (including responses to scripted questions, if any)	20
Overall Communication / Interpersonal Skills	20
Overall Demonstrated Knowledge and presentation of ability to successfully perform the full scope of work	40
Overall Performance	20
Total Possible Points	100 Pts.

6.4 Contract Award

It is the intent of the District to award a contract as the result of this RFP to the highest ranked proposer. Any contract issued to a successful proposer shall be subject to authorization by the District Board of Trustees. No agreement with the District shall be in effect until a contract has been approved by the Board of Trustees of the Los Angeles Community College District and has been signed by both parties.

In the event there is a tie-score among one or more proposals, the District can conduct a second interview, which proposers will answer a pre-selected interview question that has been sealed and kept with the Procurement Staff. The Selection Committee will rank the responses and the highest-ranked Proposal would break the tie. Any contract issued to a successful proposer is subject to authorization by the District Board of Trustees.



Appendix A: Scope of Services

A. MINIMUM SCOPE

The successful Proposer (“Contractor”) shall perform those services necessary to provide brokerage and consulting service to the District in support of its health and welfare benefits programs. Such services will include, but not be limited to any and all services outlined within this RFP whether included in the Scope of Work or elsewhere.

B. DAILY AND/OR ANNUAL SERVICES

1. Reviewing and advising the District and Joint Labor Management Benefits Committee (JLMBC) on Health and Welfare benefits insurance coverage, including recommending alternative programs for maximum benefit and cost control; including Pro-actively advising the District and JLMBC on legal, regulatory, or industry changes in Health and Welfare Benefits programs design, delivery, Compliance, ACA, or any issue that may affect the District’s Health and Welfare Benefits program;
2. Proactive Compliance and compliance-legal review and updates to the District and JLMBC on a monthly JLMBC agenda (to occur on a JLMBC agenda item each month);
3. Assist the District and JLMBC on drafting of Frequently Asked Questions (FAQ’s) and proposed responses in full Compliance with all governmental statutes, rules regulations, regulatory agency rules and regulations, and collective bargaining agreement (master benefits agreement), plan design/plan documents, evidence of coverage, and/or others;
4. Proposer shall be available to attend JLBMC meetings, and to assist the District and JLMBC with legal compliance matters; JLMBC requests for services shall be coordinated through the Chair of the JLMBC, and the question and responses shall be shared in its entirety with the JLMBC through the Chair of the JLMBC; Compliance Legal review shall be limited to health and wellness programs.
5. Proposer shall have a Compliance (Legal) Officer available to assist District, with legal compliance matters. District compliance questions shall be confidential between the District and Compliance Attorney, not including JLMBC;
6. Proactively disclose and update the District and JLMBC Health and Welfare Benefits updates, best practices, industry changes, and education of the District and JLMBC on Health and Welfare programs, utilization, coordination and maximization of benefits, including drafting agenda items for JLMBC review and including proactively discussing and describing how any statutory, regulatory or relevant case law affects the District’s health and wellness benefits plans;
7. Audit all Health and Welfare Benefits plans, including utilization studies, coordination and maximizing available benefits; provide cost of benefit to claims expense ratios; examining access to



plans and offering alternative enrollment methods; providing such data on monthly basis to the District.

8. Marketing and placement of insurance, including issuance of requests for proposals (RFP), as required/requested by the District: presently, medical is excluded (see required non-yearly services) and may include but not be limited to the following:
 - Dental PPO and HMO plans
 - Updates on clinical guidelines issued by American Dental Association
 - Compare Dental Network discounts
 - Performance guarantee benchmarking data; comparison of existing programs to benchmark data and development of improvement plan to meet industry best practices and benchmark high points
 - Vision Care
 - Updates/recommendations on improving program
 - Employee Assistance Program (EAP)
 - Assists in measuring and strengthening the performance of EAP's s and behavioral health programs, examining access, utilization, cost,
 - Life Insurance and Accidental Death and Dismemberment
 - Basic Life insurance
 - Supplemental life insurance
 - Voluntary Benefits plan
 - Any and All other benefits not listed or described herein for District and JLMBC consideration, as the District may wish to review and incorporate into the District's portfolio of coverages; conduct analysis and study, and report back to the District and JLMBC on other available benefits available in the general marketplace;
9. Data on industry practices and benchmarks, including common benefit designs, quality of care and performance standards, market trends and program costs, for comparison to the District; and offering program improvements to meet or exceed industry best practices and benchmark high points.
10. Providing as requested but no less than annually, written utilization trend reports and analysis for all brokered lines of coverage (including but not limited to dental, vision, EAP/Wellness and life products), trend analysis reports are due to the District no later than March 31, following the close of the plan year. Such reports may be requested ad hoc, quarterly, and/or annually. Such reports may be requested by the District in support of the JLMBC
11. Assists in designing and implementing a Wellness Program, including developing marketing material, educational material for employees, and coaching and assisting in the development of the Return on Investment (ROI's) or other metrics for the Wellness program, including annual or bi-annual



- comparisons, and offering program improvement recommendations to meet or exceed public entity best practices and benchmark high points.
12. Providing annual written report analyzing claim experience/financial development for all insurance coverages, EAP/Wellness and HRA/FSA.
 13. FSA/HRA (one provider to handle both) Market the FSA and HRA programs for cost benefits third party administration; annual evaluation of service goals, development of service metrics, and provision of monthly data reports on service, deposits, claims paid, amounts paid, and analyzing service model for benchmarking and industry best practices
 14. Life insurance and accidental death and dismemberment (AD&D) insurance including basic and voluntary coverage. Other voluntary accident insurance coverages, medical payment coverages, and the like.
 15. Reviewing all insurance, benefits, eligibility and coverage definitions making recommendations and analyzing suggestions from the Joint Labor/Management Benefits Committee (JLMBC) regarding benefits and plan designs for dental, vision, life, Wellness and EAP, to create and review vendor contracts and evidence of coverage including creating complex spreadsheets for rates to be distributed to adjunct faculty and others on monthly premium costs.
 16. Providing written premium reports as requested, no less than quarterly, using all available District health benefit data.
 17. Providing annual IBNR (incurred but not reported) reserves for self-insured products
 18. Troubleshoot and resolve carrier claims, billing and operational issues
 19. Assisting with implementation and transition of carriers and administrators.
 20. Attending meetings of the Board of Trustees, JLMBC and other District meetings as requested.
 21. Assist in the development of the District's EAP and Wellness Program, including but not limited to develop concepts, campaigns, marketing, employee engagement strategies, budget development, vendor selection, etc. Note: Cost not to include the introduction of a 3rd party wellness vendor, nor 3rd party EAP vendor.
 22. Assist with technology platforms.
 23. Act as liaison for the District with insurance companies and employee benefit vendors.
 24. Voluntary Benefits – explore options for districtwide programs, including vendor search and implementation.
 25. Assist in the development of the District's Wellness Program providing “best practice” recommendations related to a robust program specifically in a fixed rate CalPERS medical benefit environment.
 26. Be a resource to the District as a source of new ideas, trends in health care, and Health Care Reform change in regulations and/or legal issues.



27. Review and revise the District overall Benefits plan documents, including following up with the District for development of Board of Trustee agenda items as may be required.
28. Draft, develop, print, produce and provide “ready art” employee benefits notices, benefit guides, tri-folds, educating employees about their available health and welfare benefits programs, showing district premium portion or employee premium portion/pro-rata costs.
29. Draft, develop Open Enrollment presentations, produce and provide video recordings for Open Enrollment educating employees about their available health and welfare benefits programs, showing district premium portion or employee premium portion/pro-rata costs.
30. Attend Open Enrollment meetings as requested by Board of Trustees, JLMBC and the District.
31. Assist gathering raffle incentives from insurance carriers for employees during Open Enrollment.
32. Attend all JLMBC meeting; and coordinate the agenda development with the Chair of the District’s Joint Labor Management Benefits Committee (JLMBC) and District’s Management Representative: agenda setting may be accomplished through an agenda setting telephone call.

C. REQUIRED NON-YEARLY SERVICES

Marketing and possible placement of medical insurance, including issuance of requests for proposals (RFP) as required. This includes analysis of the cost/benefits of leaving the CalPERS medical insurance system – services to be provided at the request of the District.



Appendix B: Cost Proposal

Provide pricing in accordance with the District's current requirements, as set forth in this RFP including Appendix A: Scope of Services. It is the proposer's responsibility to understand the complexity of this service as well as the complexity of the proposed work and to submit a cost accordingly using the form below.

The Proposer shall quote an annual total fixed flat fee for completing all requirements outlined in the Scope of Work. Quote a fee for the initial term and for each of the potential successive two years of the contract term; and provide a separate price quote for newsletter items as described in Additional Cost Section below.

The annual total fixed flat fee shall be inclusive of all expenses and costs, except for the Additional Cost Item listed below.

ADDITIONAL COST ITEM

Proposer shall provide a cost estimate, "Not To Exceed" cost for creation, printing, and distribution of an employee benefits newsletter, on 8 1/2" x 12" glossy newsprint format (must meet ADA standards and requirements) or as may be requested by the District (and from the JLMBC).

Proposer shall develop and produce semi-annual newsletter communications and materials. All printing and postage costs shall be paid by the District only in reimbursement of costs incurred by Contractor and substantiated by invoices issued and already paid by Contractor. Working with JLMBC sub-committee to publish up to six (6) newsletters (or equivalent employee communications) each fiscal year but only two newsletters will require printing. Final draft and cost estimate must be approved by JLMBC before printing and mailing newsletters.



Description of Services	Fixed Flat Fee	Additional Cost item Not-to-Exceed Amount
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		
Total 5-Year Cost		

The Proposer’s only source of income, revenue or compensation earned or received by the Proposer in connection to the District’s account is the annual total fixed flat fee paid to the Proposer by the District. Any other source of income, revenue, consideration, or compensation, including, but not limited to, commissions and overrides received by the Proposer in connection to the District’s account, must be disclosed and reimbursed back to the District.



Appendix C: Mandatory documents to be Submitted in Response

Exhibit A:	Non-Collusion Affidavit
Exhibit B:	Certificate of Non-Discrimination
Exhibit C:	Completed Confidentiality Agreement
Exhibit D:	Acknowledgment of all addenda issued by the District
Exhibit E:	Exceptions and Deviations to the Standard Form Agreement
Exhibit F:	Russian Economic Sanctions Certification
Exhibit G:	Small, Local, Emerging, Disadvantaged, Vendor (SLEDV)



Exhibit A: Non-Collusion Affidavit

(TO BE EXECUTED BY PROPOSER AND SUBMITTED WITH IT'S PROPOSAL)

(Name) _____, being first duly sworn, disposes and says that he or she is (Title) _____ of (Provider) _____ the party making the foregoing proposal, that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the proposer has not directly or indirectly induced any other proposer to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, with any proposer or anyone else to put in a sham proposal, or that anyone shall refrain from proposing; that proposer has not in any manner, directly, or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the proposer or any other proposer, or to secure any advantage against the body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and further, that the proposer has not, directly or indirectly, submitted his or her proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusion or sham proposal.

IN WITNESS WHEREOF, the undersigned has executed this Non-Collusion Affidavit this

_____ Day of _____, 2025

PROPOSER _____
(Type or Print Complete Legal Name of Provider)

By _____ (Signature)

Name _____ (Type or Print)

Title _____

Address _____

City _____ State _____ Zip _____



Exhibit B: Certificate of Non-Discrimination

(TO BE EXECUTED BY PROPOSER AND SUBMITTED WITH ITS PROPOSAL)

Proposer hereby certifies that in performing work or providing services for the District, there shall be no discrimination in its hiring or employment practices because of age, sex, race, color, ancestry, national origin, religious creed, physical handicap, medical condition, marital status, or sexual orientation, except as provided for in Section 12940 of the California government Code. Proposer shall comply with applicable federal and California anti-discrimination laws, including but not limited to the California Fair Employment and Housing Act, beginning with Section 12900 of the California Government Code.

IN WITNESS WHEREOF, the undersigned has executed this Certificate of Non- Discrimination this

_____ day of _____, 2025

PROPOSER _____

(Type or Print Complete Legal Name of Provider)

By _____
(Signature)

Name _____
(Type or Print)

Title _____

Address _____

City _____ State _____ Zip _____



Exhibit C: Completed Confidentiality Agreement

The undersigned, a duly authorized officer of

_____, does hereby represent, warrant and agree to the following statement:

All financial, statistical, personal, technical or other data and information relating to the District's operation which are designated confidential by the District and made available to the undersigned shall be protected by the undersigned from unauthorized use and disclosure.

Date: _____ *Name of Proposer*

By: _____
Authorized Officer



Exhibit D: Acknowledgement of All Addenda Issued By The District

The Proposer shall signify receipt of all Addenda, if any, here:

ADDENDUM NO.	DATE RECEIVED	SIGNATURE

If necessary, please print and sign additional pages.

PROPOSER _____
 (Type or Print Complete Legal Name of Provider)

By _____
 (Signature)

Name _____
 (Type or Print)

Title _____

Address _____

City _____ State _____ Zip _____



Exhibit E: Exceptions and Deviations to the Standard Form Agreement

- A. The Proposer acknowledges it has read and reviewed the Professional Services Agreement in Exhibit F and attests to the following:
- B. Certain exceptions and deviations may deem the proposal non-responsive and result in rejection of the proposal.
 - 1. Proposals that mandate the use of provider standard services contract, rather than utilizing the District’s standard services contract.
 - 2. Proposals that reject the following integral provisions of the District's contract terms and conditions will be treated as a rejection of the District's contract and these proposals will be rejected.

Section 5	Term of Agreement
Section 14	Family Educational Rights Privacy Act (FERPA)
Section 18	Governing Law
Section 19	Non-Discrimination
Section 22	Board Authorization
Section 27	Requirement for Federally-Funded Contracts
Section 28	Accessibility Requirements

In the event that exceptions and deviations to the Professional Services Agreement are requested after the contract has been awarded, the District may deem the proposal non-responsive and may disqualify the proposal at its discretion.

- We have no exceptions or deviations to the Professional Services Agreement**
- We have the following or the attached exceptions and/or deviations to the Professional Services Agreement.**

PROPOSER _____
 (Type or Print Complete Legal Name of Provider)

By _____ (Signature)

Name _____ (Type or Print)

Title _____

Address _____

City _____ State _____ Zip _____



Exhibit F: Russian Economic Sanctions Certification

I, an owner or officer of the Proposer named below, hereby certify as follows:

1. I am duly authorized to execute this certification on behalf of the Proposer identified below.
2. The Proposer is not a Russian individual or entity that has been determined by the U.S. Government to be a target of economic sanctions pursuant to federal Executive Orders 14065, 13660, 13661, 13662, 13685 and 13849 or any other related federal or state orders, statutes, rules, or regulations.
3. The Proposer has not proposed in its Proposal submitted with this certification to enter into any contract for services related to the RFP that is the subject of this certification, with any Russian individual or entity that has been determined by the U.S. Government to be a target of economic sanctions pursuant to federal Executive Orders 14065, 13660, 13661, 13662, 13685 and 13849 or any other related federal or state orders, statutes, rules, or regulations.
4. If Proposer is selected for the award of a contract with the District, the Proposer shall fully comply with all applicable requirements of Executive Order N-6-22 signed by the Governor of the State of California on March, 4, 2022 and all other state and federal requirements related thereto (including, without limitation, if the contract awarded to Proposer has a total value of more than \$5 million, all notification and reporting requirements thereof), including the execution by Proposer and its Subconsultants of such additional certifications or other documents as the District may determine, in its sole and absolute discretion, are confirmatory of the Proposer’s and its Subconsultants’ compliance and continuing compliance with the foregoing.

Proposer Name (print): _____

Owner/Officer Name (print): _____

Owner/Officer Signature: _____

Date: _____



Exhibit G: Certification of Small, Local, Emerging, And Disabled Veteran Business (SLEDV)

The undersigned, a duly authorized officer of _____, does hereby certify, represent and warrant the following statement(s) below: (Please indicate below all that apply.)

- A. _____ Proposer is a "Small" business that has met the applicable ownership, operation, and size requirements, and has been certified by a Federal agency or a California public agency as a small business enterprise.
- B. _____ Proposer is a "Local" business has its principal place of business in the County of Los Angeles.
- C. _____ Proposer is an "Emerging" business that has been in business in its substantially current form for only up to five (5) years.
- D. _____ Proposer is a "Disabled Veteran Owned" business that is fifty-one-percent (51%) owned and operated by one or more disabled veterans certified by the State of California Department of General Services or a Federal government agency.
- E. _____ Does not apply

Date: _____

Name of Proposer

By: _____

Authorized Officer Signature

Title



Exhibit H: Professional Services Agreement

PROFESSIONAL SERVICES AGREEMENT

PARTIES:

LOS ANGELES COMMUNITY COLLEGE DISTRICT
("District")

770 Wilshire Boulevard
Los Angeles, Ca 90017
Attn: _____

Attn _____
[Contact name and phone number]
("College")
("Contractor")

DATE:

TERM OF AGREEMENT:

From:

To:

Any reference in the header information set forth in the upper right corner on the front page of this Agreement, to "Contract Amount" and to dates identified as "Start Date" and "End Date," specifically indicates only those provisions made, or the intent thereof, to fully fund the Agreement for scheduled payments due hereunder during the current fiscal year, and is not to be construed as a reference to the intended or actual contract period, or to the full sum of payments that have been made or are still to be made under this Agreement.

RECITALS

WHEREAS, the District is authorized to contract for the procurement of professional services as authorized by law; and

WHEREAS, the Contractor is specially licensed, trained, experienced and competent to perform the services described herein pursuant to this agreement;

NOW, THEREFORE, in consideration of the mutual covenants and conditions hereinafter contained, the parties hereby agree as follows:

AGREEMENT



- 1. SERVICES.** The Contractor shall perform the Services set forth in Exhibit "A" (the "Services") in compliance with specifications and standards set forth in that Exhibit. The District shall have the right to order, in writing, changes in the scope of services or under the Services to be performed with any applicable version of the compensation paid hereunder agreed upon by the District and the Contractor. Any adjustment to fees, rate schedules, or schedule of performance can only be adjusted pursuant to written agreement between the parties.
- 2. WARRANTIES.** The Contractor warrants and represents that it is specially trained, qualified, duly licensed, experienced, and competent to provide the Services. The Contractor warrants that Services (and any goods in connection therewith) furnished hereunder will conform to the requirements of this agreement (including all descriptions, specifications and drawings made a part hereof) and in the case of goods will be merchantable, fit for their intended purposes, free from all defects in materials and workmanship and to the extent not manufactured pursuant to detailed designs furnished by the District, free from defects in design. The District's approval of designs or specifications furnished by the Contractor shall not relieve the Contractor of its obligations under this warranty. All warranties, including special warranties specified elsewhere herein, shall inure to the District, its successors, assigns, and users of the goods or services.
- 3. FEES.** The District shall pay the Contractor the fees set forth in Exhibit B, in accordance with the terms and conditions of this Agreement. The Contractor represents that such fees do not exceed the Contractor's customary current price schedule. The District shall pay all applicable taxes; excepting, however, the federal excise tax, and all state and local property taxes, as college districts are exempt therefrom. Payment shall be made by the District's Accounts Payable Office upon submittal of invoice(s) approved by the Vice-President of Administration, or designee, at the College.
- 4. EXPENSES.** The Contractor shall assume all expenses incurred in connection with performance except as otherwise provided in this agreement.
- 5. TERM OF AGREEMENT.** This agreement shall be for the term set forth above, unless sooner terminated pursuant to the terms hereof.
- 6. TERMINATION OF AGREEMENT.** This agreement may be terminated by the District by providing 30 days' prior written notice to the Contractor or immediately upon breach of this agreement by the Contractor.
- 7. DOCUMENTATION.** The Contractor agrees to provide to the District, at no charge, a sufficient number of nonproprietary manuals and other printed materials, as used in connection with the Services, and updated versions thereof, which are necessary or useful to the District in its use of the Services provided hereunder.



- 8. RIGHTS IN DATA.** All technical communications and records originated or prepared by the Contractor pursuant to this agreement including papers, reports, charts, computer programs, and other documentation, but not including the Contractor's administrative communications and records relating to this agreement shall be delivered to and shall become the exclusive property of the District and may be copyrighted by the District. The ideas, concepts, know-how, or techniques relating to data processing, developed during the course of this agreement by the Contractor or jointly by the Contractor and the District can be used by either party in any way it may deem appropriate. All inventions, discoveries or improvements of the computer programs developed pursuant to this agreement shall be the property of the District. During the term of this agreement, certain information which the District deems confidential ("Confidential Information") might be disclosed to the Contractor. The Contractor agrees not to divulge, duplicate or use any Confidential Information obtained by the Contractor during the Contractor's engagement. Such Confidential Information may include, but is not limited to, student and employee information, computer programs, and data in the District's written records or stored on the District's computer systems.
- 9. CONTRACTOR ACCOUNTING RECORDS.** Records of the Contractor's directly employed personnel, other consultants and reimbursable expenses pertaining to the work and records of account between the District and the Contractor shall be maintained on an accounting basis acceptable to the District and shall be available for examination by the District or its authorized representative(s) during regular business hours within one (1) week following a request by the District to examine such records. Failure by the Contractor to permit such examination within one (1) week of a request shall permit the District to withhold all further payments until such examination is completed unless an extension of time for examination is authorized by the District in writing.
- 10. RELATIONSHIP OF PARTIES.** With regard to performance hereunder, the Contractor is an independent contractor and not an officer, agent, partner, joint venturer, or employee of the District. The Contractor shall not, at any time, or in any manner, represent that it or any of its agents or employees is in any manner agents or employees of the District.
- 11. DISTRICT REPRESENTATIVE.** The contact person set forth above or his or her designee shall represent the District in the implementation of this agreement.
- 12. WAIVER OF DAMAGES; INDEMNITY.** The Contractor hereby waives and releases the District from any claims the Contractor may have at any time arising out of or relating in any way to this agreement, except to the extent caused by the District's willful misconduct. Notwithstanding the foregoing, the parties agree that in no event shall the District be liable for any loss of the Contractor's business, revenues or profits, or special, consequential, incidental, indirect or punitive damages of any nature, even if the District has been advised in advance of the possibility of such damages. This shall constitute the District's sole liability to the Contractor and the Contractor's exclusive remedies against the District. Except for the sole negligence or willful misconduct of the District the Contractor shall indemnify, hold harmless and defend the District and its Board of Trustees, officers, employees, and



agents from any liability, losses, costs, damages, claims, and obligations relating to or arising from this agreement.

Without limiting the foregoing, the Contractor shall indemnify and hold harmless the District, and its Board of Trustees, officers, employees, and agents from all liability, losses, costs, damages, claims, and obligations of any nature or kind, including attorney's fees, costs, and expenses, for infringement or use of any copyrighted or uncopied composition, secret process, patented or unpatented invention, article or appliance, registered or unregistered trademark, service mark, or tradename, furnished or used in connection with this agreement. The Contractor, at its own expense, shall defend any action brought against the District to the extent that such action is based upon a claim that the goods or software supplied by the Contractor or the operation of such goods infringes a patent, trademark, or copyright or violates a trade secret.

13. INSURANCE. Without limiting the Contractor's indemnification of the District and as a material condition of this agreement, the Contractor shall procure and maintain at its sole expense, for the duration of this agreement, insurance coverage with limits, terms and conditions at least as broad as set forth in this section. The Contractor shall secure and maintain, at a minimum, insurance as set forth below, with insurance companies acceptable to the District to protect the District from claims which may arise from operations under this agreement, whether such operations be by the Contractor or any subcontractor or anyone directly or indirectly employed by any of them. As a material condition of this agreement, the Contractor shall furnish to the District certificates of such insurance and endorsements, which shall include a provision for a minimum thirty-days' notice to the District prior to cancellation of or a material change in coverage.

The Contractor shall provide the following insurance:

- a. Commercial General Liability Insurance, "occurrence" form only, to provide defense and indemnity coverage to the Contractor and the District for bodily injury and property damage. Such insurance shall name the District as an additional named insured and shall have a combined single limit of not less than two million dollars (\$2,000,000) per occurrence; four million dollars (\$4,000,000) aggregate. The policy so secured and maintained shall include personal injury, contractual or assumed liability insurance; independent contractors; premises and operations; products liability and completed operation; broad form property damage; broad form liability; and owned, hired and non-owned automobile insurance. The policy shall be endorsed to provide specifically that any insurance carried by the District which may be applicable to any claim or loss shall be deemed excess and non-contributory, and the Contractor's insurance primary, despite any provisions in the Contractor's policy to the contrary.
- b. Professional liability insurance in an amount not less than one million dollars (\$1,000,000) per incident.



- c. Workers' Compensation Insurance with limits as required by the Labor Code of the State of California and Employers Liability insurance limits of not less than one million dollars (\$1,000,000) per accident.
- d. SEXUAL ABUSE AND MOLESTATION (SAM). If the work will include contact with minors, and the CGL policy referenced above is not endorsed to include affirmative coverage for sexual abuse or molestation. Contractor shall obtain and maintain a policy covering Sexual Abuse and Molestation with a limit no less than One Million Dollars \$1,000,000 per occurrence or claim; two Million Dollars (\$2,000,000) aggregate.

Failure to maintain the insurance and furnish the required documents may terminate this agreement without waiver of any other remedy the District may have under law.

14. FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT. Vendor, its employees, agents or representatives may be provided access to Student Information during its performance of this Agreement. Vendor acknowledges that it is subject to and will fully comply with the privacy regulations outlined in the Family Educational Rights and Privacy Act. 20 U.S. C. SS 1232g; 34 C.F. R. Part 99, as amended (FERPA), for the handling of such information. Company will not disclose or use any Student Information except to the extent necessary to carry out its obligations under this Agreement and as permitted expressly by FERPA. Company shall implement and maintain administrative, physical and technical safeguards (Safeguards), at its expense, that prevent any collection, use or disclosure of, or access to, Student Information that this agreement does not expressly authorize, including without limitation, an information security program and/or protocols that meet the standards of industry practice to safeguard such Student Information.

15. HIPAA Compliance. The parties agree that, to the extent required by Legal Requirements, the services provided under this Agreement will comply in all material respects with all federal and state-mandated regulations, rules, or orders applicable to the services provided herein, including but not limited to regulations promulgated under Title II, Subtitle F of the Health Insurance Portability and Accountability Act (Public Law 104-91) ("HIPAA").

16. AMENDMENTS. This agreement is the entire agreement between the parties as to its subject matter and supersedes all prior or contemporaneous understandings, negotiations, or agreements between the parties, whether written or oral, with respect thereto. This agreement may be amended only in a writing signed by both parties.

17. ASSIGNMENT. This agreement may not be assigned or otherwise transferred, in whole or in part, by either the District or the Contractor without prior written consent of the other.

18. GOVERNING LAW. This agreement shall be deemed to have been executed and delivered within the State of California, and the rights and obligations of the parties hereunder, and any action arising



from or relating to this agreement, shall be construed and enforced in accordance with, and governed by, the laws of the State of California or United States law, without giving effect to conflict of laws principles. Any action or proceeding arising out of or relating to this agreement shall be brought in the county of Los Angeles, State of California, and each party hereto irrevocably consents to such jurisdiction and venue, and waives any claim of inconvenient forum.

- 19. NONDISCRIMINATION.** The Contractor hereby certifies that in performing work or providing services for the District, there shall be no discrimination in its hiring, employment practices, or operation because of sex, race, religious creed, color, ancestry, national origin, physical disability, mental disability, medical condition, marital status, or sexual orientation, except as provided for in section 12940 of the Government Code. The Contractor shall comply with applicable federal and California anti-discrimination laws, including but not limited to, the California Fair Employment and Housing Act, beginning with Section 12900 of the California Government Code, the provisions of the Civil Rights Act of 1964 (Pub. L. 88-352; 78 Stat. 252) and Title IX of the Education Amendments of 1972 (Pub. L. 92-318) and the Regulations of the Department of Education which implement those Acts. The Contractor agrees to require compliance with this nondiscrimination policy by all subcontractors employed in connection with this agreement.
- 20. EQUAL OPPORTUNITY EMPLOYER.** The Contractor, in the execution of this agreement, certifies that it is an equal employment opportunity employer.
- 21. ATTORNEYS' FEES AND COSTS.** If either party shall bring any action or proceeding against the other party arising from or relating to this agreement, each party shall bear its own attorneys' fees and costs, regardless of which party prevails.
- 22. BOARD AUTHORIZATION.** The effectiveness of this agreement is expressly conditioned upon approval by the District's Board of Trustees.
- 23. SEVERABILITY.** The Contractor and the District agree that if any part, term, or provision of this agreement is found to be invalid, illegal, or unenforceable, such invalidity, illegality, or unenforceability shall not affect other parts, terms, or provisions of this agreement, which shall be given effect without the portion held invalid, illegal, or unenforceable, and to that extent the parts, terms, and provisions of this agreement are severable.
- 24. TERMINATION FOR NON-APPROPRIATION OF FUNDS.** If the term of this agreement extends into fiscal years subsequent to that in which it is approved, such continuation of the agreement is contingent on the appropriation and availability of funds for such purpose, as determined in good faith by the District. If funds to affect such continued purpose are not appropriated or available as determined in good faith by the District, this agreement shall automatically terminate and the District shall be relieved of any further obligation.



25. NOTICE. Any notice required to be given pursuant to the terms of this agreement shall be in writing and served personally or by deposit in the United States mail, postage and fees fully prepaid, addressed to the applicable address set forth above. Service of any such notice if given personally shall be deemed complete upon delivery, and if made by mail shall be deemed complete on the day of actual receipt or at the expiration of 2 business days after the date of mailing, whichever is earlier.

26. CONFLICTS OF INTEREST. The Contractor agrees not to accept any employment or representation during the term of this agreement which is or may likely make the Contractor financially interested. (as provided in California Government Code Sections 1090 and 87100) in any decision made by the District on any matter in connection with which the Contractor has been retained pursuant to this agreement.

27. REQUIREMENTS FOR FEDERALLY FUNDED CONTRACTS.

- A. If this Agreement is funded by the District, in whole or in part, from revenues received from the Federal Government, then the following additional provisions shall apply. It shall be the Contractor's responsibility to ascertain if Federal funds are involved.
- A. Contractor, and any subcontractors at any tier, shall comply with E.O. 11246, "Equal Employment Opportunity," as amended by E.O. 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and as supplemented by regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."
- A. No contract, or any subcontract at any tier, shall be made to parties listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Nonprocurement Programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension." This list contains the names of parties debarred, suspended, or otherwise excluded by agencies, and contractors declared ineligible under statutory or regulatory authority other than E.O. 12549. Contractors with awards that exceed the small purchase threshold (currently \$100,000) shall provide the required certification regarding its exclusion status and that of its principal employees.

28. Vendor hereby warrants that the products and services to be provided under this Agreement will comply with the accessibility requirements of Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. Section 794d) and its implementing regulations set forth at Title 36, Code of Federal Regulations, parts 1193 and 1194. Vendor agrees to test and validate its product, and any related website or online content it produces, with sufficient regularity in order to ensure the product and associated content meet conformance with all applicable Revised 508 Standards and Web Content Accessibility Guidelines (WCAG) 2.1 Level AA standards (see <https://www.w3.org/TR/WCAG21/>), in accordance with the required testing methods. The vendor shall maintain and retain full documentation of the measures taken to ensure compliance with the applicable requirements stated above, including records of any testing or demonstrations conducted. Vendor shall provide the District



with copies of all Accessibility Conformance Reports (ACR) and Supplemental Accessibility Conformity Reports (SACR) that are produced related to the product or service. Further, Vendor agrees to promptly respond to and fully resolve any complaint regarding accessibility of its products or services which is brought to its attention. All resolutions provided by the vendor in response to complaints regarding information and communications technology (ICT) accessibility of its product(s) shall meet conformance with established WCAG 2.1 Level AA requirements. Vendor further agrees to indemnify and hold harmless the Los Angeles Community College District, including any of its nine colleges using the vendor's products or services from any claim arising out of its failure to comply with the aforesaid requirements. Failure to comply with these requirements shall constitute a breach and be grounds termination of this Agreement. Throughout the life of the agreement, the District reserves the right to independently perform any necessary testing on vendor's product or service to verify conformance or any representation of conformance made by the vendor with this section.

29. EXECUTIVE ORDER N-6-22 ECONOMIC SANCTIONS AGAINST RUSSIA

Notice to All Contractors and Entities Doing Business with Los Angeles Community College District:

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (EO) regarding sanctions in response to Russian aggression in Ukraine. The EO is located at <https://www.gov.ca.gov/wp-content/uploads/2022/03/3.4.22-Russia-Ukraine-Executive-Order.pdf>

As a contractor or grantee, compliance with the economic sanctions imposed in response to Russia's actions in Ukraine is required, including with respect to, but not limited to, the federal executive orders identified in the EO and the sanctions identified on the U.S. Department of the Treasury website <https://home.treasury.gov/policy-issues/financial-sanctions/sanctions-programs-and-country-information/ukraine-russia-related-sanctions>. Failure to comply may result in the termination of contracts or grants, as applicable.

30. DISTRICT AUTHORITY. The Chancellor, Deputy Chancellor, Director of Business Services, Contracts Manager, Chief Facilities Executive, Director of Facilities Planning and Development, College President or Vice President of Administrative Services have delegated authority from the District Board of Trustees to bind District contractually. Persons acting in positions not specified above or have specific delegated authority by the Board of Trustees and those in the capacity as project managers or consultants to District do not have authority to: (1) obligate or commit District to any payment of money; (2) obligate District to any modification to this Contract or the Contract Sum; (3) relieve Contractor of any of its obligations under this Contract; or (4) approve or order any Work to be done or materials, equipment or supplies to be delivered.

IN WITNESS WHEREOF, the parties hereto have executed this agreement in Los Angeles, California, on the date set forth above.



CONTRACTOR

By: _____

Date: _____

Name: _____

Title: _____

By: _____

Date: _____

Name: _____

Title: _____

DISTRICT

LOS ANGELES COMMUNITY COLLEGE DISTRICT

By: THE BOARD OF TRUSTEES OF THE LOS ANGELES COMMUNITY COLLEGE DISTRICT

By: _____

Date: _____

Name: _____

Title: _____