



*Opening doors to a better life*

**CONFERENCE PLANNING for  
STATEWIDE AFFORDABLE HOUSING CONFERENCE**

**REQUEST FOR PROPOSALS  
2024**

**Deadline for submission:  
Friday, October 25, 2024  
5:00 p.m.  
Prevailing Pacific Time**

*Please email to:*

**Bob Peterson  
Bob.Peterson@wshfc.org  
Washington State Housing Finance Commission  
1000 Second Avenue, Suite #2700  
Seattle, WA 98104-1046**

**WASHINGTON STATE HOUSING FINANCE COMMISSION  
REQUEST FOR PROPOSALS**

**CONFERENCE PLANNING SERVICES  
FOR AFFORDABLE HOUSING CONFERENCES**

**INTRODUCTION AND BACKGROUND**

**ISSUING OFFICER**

Bob Peterson  
Deputy Director  
1000 Second Avenue, Suite 2700  
Seattle, Washington 98104-1046  
(206) 287-4454  
[Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org)

**PURPOSE**

The Washington State Housing Finance Commission wishes to contract for conference planning services with a qualified, creative, and experienced business organization to organize, promote, plan, manage, and execute affordable housing conferences, in particular the annual Housing Washington conference ([www.housingwa.org](http://www.housingwa.org)).

**COMMISSION COMMITMENT TO PROMOTING RACIAL EQUITY:**

**The Washington State Housing Finance Commission has committed to racial equity as a lens through which all programs and initiatives will be assessed. This will apply to all aspects of *Housing Washington* conferences.**

**TIME PERIOD**

The Commission expects the contract period for this contract to be **two years** from the start date of the contract.

## **CONTRACT AMOUNT**

Services will be performed on a time and material basis at hourly rates or on agreed upon project costs, as authorized.

## **TIME SCHEDULE FOR COMPLETION OF THIS RFP**

<b>RFP Posted:</b>	<b>Friday, August 16, 2024</b>
<b>RFP Questions Due:</b>	<b>Friday, August 30, 2024, at 5:00 PM, Prevailing Pacific Time</b>
<b>RFP Pre-Bid Conference: Time</b>	<b>Friday, August 30, 2024, 10:00 AM Prevailing Pacific Time</b>
<b>First Q&amp;A Posted:</b>	<b>Friday, September 6, 2024</b>
<b>Last Questions Accepted: Time</b>	<b>Tuesday, October 22, 2024, 5:00PM Prevailing Pacific Time</b>
<b>Last Q&amp;A Posted:</b>	<b>Tuesday, October 24, 2024</b>

Interested parties seeking to attend the virtual Pre-Bid Conference meeting address must submit their request no later than 5:00 p.m. Prevailing Pacific Time on **Thursday, August 29, 2024**, via email to:

[Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org)

**Proposals Due:** **Friday, Friday, October 25, 2024, at 5:00 PM,  
Prevailing Pacific Time**

Interviews may be conducted at the Commission's discretion and a final decision may be based solely on submitted proposals.

Interested parties must submit their proposals no later than 5:00 p.m. Prevailing Pacific Time on **Friday, October 25, 2024**, via email to:

[Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org)

The Commission reserves the right to modify the time schedule, including extending the proposal due date, with notice to all potential proposers that have submitted a letter of intent to submit.

## **QUESTIONS**

Questions regarding the information contained in the RFP must be submitted electronically to the designated RFP contact, Bob Peterson at [Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org), no later than 5:00 PM Prevailing Pacific Time, Friday, August 23, 2024. All questions will be answered and posted on the Commission's website at [www.wshfc.org](http://www.wshfc.org) after the Pre-Bid.

## **PROPOSAL SUBMISSION**

If your organization is interested in working with the Commission as a conference planning consultant, please submit a proposal electronically to the Commission by **5:00 PM Prevailing Pacific Time, on or before Friday, October 25, 2024** to: [Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org).

***ALL MATERIALS MUST BE SUBMITTED ELECTRONICALLY  
NO FACSIMILE (FAX) TRANSMITTED PROPOSALS WILL BE ACCEPTED.***

**Late Submissions:** A proposal shall be considered late if received at any time after 5:00 p.m., Prevailing Pacific Time, Friday, October 25, 2024. Proposals received after the specified time WILL NOT be given further consideration.

Prior to the date and time designated for receipt of proposals, any proposal may be modified or withdrawn by email notice to [Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org). Such notice shall be delivered on or before the date and time set for receipt of proposals.

As of the date of this request and except as provided in this paragraph, there shall be no ex parte communication with Commissioners, staff, or others participating in the selection process except as set forth below in this paragraph. Any such ex parte communications shall be grounds for disqualifying the Proposer. All communications concerning the selection process should be addressed to Bob Peterson, Deputy Director, Washington State Housing Finance, [Bob.Peterson@wshfc.org](mailto:Bob.Peterson@wshfc.org).

By submitting a proposal, Proposers agree that they waive any claim against the Commission, the State of Washington, and their respective officers, employees, and agents for the recovery of any costs or expenses incurred in preparing and submitting a proposal or participating in an interview, if required.

## **COMMISSION BACKGROUND**

Washington State Housing Finance Commission (the Commission) is a publicly accountable, self-supporting team dedicated to increasing racially equitable housing access and affordability and to expanding the availability of quality community services for the people of Washington.

The Commission uses no state tax revenues. It serves as a financial conduit connecting private lenders, public funders, developers, real estate professionals, first-time homebuyers and nonprofit organizations to:

- Create affordable rental housing and privately owned housing throughout the state
- Assist nonprofit organizations to build facilities to house people or provide a broad spectrum of important human services
- Promote homeownership
- Encourage community development and community services
- Impact economic stimulus through vital programs

## **HOUSING WASHINGTON CONFERENCE PROJECT DESCRIPTION**

The Housing Washington conference ([www.housingwa.org](http://www.housingwa.org)), held every year since 1994, is presented by the Commission in partnership with the Washington State Department of Commerce and the Low Income Housing Alliance. The vision for this conference is to be Washington state's most significant resource for affordable housing guidance, innovation, and solutions. Its mission is to enhance the skills, vision, and understanding of professionals working in affordable housing in Washington state and challenge them to work toward racial equity and social justice. Housing Washington is also nationally recognized for contributions in the affordable housing arena.

The conference is overseen by Housing Finance Commission executive leadership, with the contract under the direction of the Commission's deputy director or designated staff. A committee composed of other Commission staff along with staff from our co-sponsoring organizations, the Department of Commerce and the Low-Income Housing Alliance, typically meets early each year to set the conference agenda and select keynote speakers and other content.

Beginning in 2023, the Commission established session "tracks" for different audiences at the conference. These five tracks are led by Commission staff with support from the conference contractor. The subjects are Homeownership, Multifamily Development, Multifamily Management, Advocacy/Communications, and General.

The conference alternates its location each year between the east side (Spokane) and west side (Tacoma or Bellevue) of the state. During the COVID-19 pandemic, the conference was held virtually and in 2022 returned to an in-person event. Because of the virtual success, we added a virtual pre-conference component that is free to the public.

## **Conference Values**

- Commitment to inclusivity, social justice, and anti-racism in every aspect of the conference.
- Unique presentations and information not widely available online.
- Sharing new tools and programs specifically designed to make attendees more effective in their daily work and long-term planning.
- Dynamic presenters who effectively deliver concepts both visually and auditorily.
- Providing a platform for experts to share their good work and enhance our attendees' knowledge.
- Meaningful dialogue on timely issues affecting the housing industry as well as the communities of Washington state.
- Inspiring housing professionals with new ideas and connections to others.

## **Overall Conference Objectives**

- Design and deliver effective presentations that focus on new programs, opportunities, and services that enhance our attendees' ability to execute their organization or agency's goals.
- Seek well-respected plenary speakers who excite and ignite our attendees, and who are first-time presenters to the majority of our attendees.
- Ensure presenters and speakers reflect racial, gender and other kinds of diversity regardless of topic.
- Present topics that challenge our industry to reflect on our past contribution to inequality in our state and take responsibility for addressing it.
- Provide outstanding gatherings that enhance networking and interaction among our attendees, providing a unique annual connection opportunity with leaders, peers, and colleagues.
- Expertly execute the logistics of the conference to present a seamless conference experience, whether the conference is in-person or virtual.
- Allow conference sponsors to position themselves as leaders in affordable housing and valued resources in the industry.
- Design each session to deliver best practices, new directions, and new actionable policies that enable attendees to grow, be enlightened, and be inspired.
- Overlay inclusion in every aspect of the conference resulting in an understanding and appreciation by all attendees to the rights, respect, and contributions of everyone involved.
- Present high-profile keynote/plenary speakers that typically would not be available to attendees via live presentations.

## **DELIVERABLES**

The following is a list of tasks for which the consultant may be responsible. Please format your proposal to include each of the tasks/services identified. The Commission reserves the right to perform identified tasks in-house or through specifically identified contractors. Those chosen to provide conference-planning services will work with a planning team which will include identified Commission staff as well as representatives of Commerce and the Alliance to develop a theme and a conceptual plan for the event.

Contractor Services include:

1. Develop and manage a **conference direction and a detailed budget**;
2. Secure **sponsors and exhibitors** to provide both financial and marketing support to the conference; provide strategic recommendations on how to grow sponsor/exhibitor revenue streams;
3. Facilitate the **conference planning committee** to develop an agenda of a broad range of topics and to select keynote speakers and session presenters;
4. Work closely with “track teams” that determine session content for the conference subject-area tracks (Homeownership, Multifamily Development, Multifamily Management, and Advocacy/Communications).
5. Secure negotiated contracts with national and regional level **speakers and subject experts** who are engaging, informative, and who motivate attendance; deliver the entire program within a preset speaker budget; work directly with the contract manager on negotiations;
6. Provide quality **speaker management services**, including coordinating travel and hotel arrangements, arranging and managing experienced audio visual services, receiving presentations from speakers and syncing with audio visual team, developing a communication system with speakers to ensure an accurate information exchange, developing and tracking an up-to-date master speaker roster, troubleshooting last-minute cancellations, organizing replacements, developing welcome packets with hotel, writing post-conference thank you letters, managing speaker invoice payments, and handling other communication needs;
7. **Manage the conference website**, [www.housingwa.org](http://www.housingwa.org), and social media channels.
8. **Market the conference** to existing conference audiences as well as new and underserved audiences across Washington state; manage the conference’s visual brand identity and voice; develop and distribute digital and printed materials to support marketing and communications needs.

9. Secure state-wide nonprofit organizations and public agencies as **endorsers** to market the conference to boost attendance; coordinate visibility benefits for endorsers;
10. Position **scholarship opportunities** to the nonprofit community and manage the execution of the scholarship program once recipients have been determined, including awarded reimbursable items such as lodging and travel expenses; manage the invoice payment process for scholarship recipients.
11. Manage all elements of **registration and registrant communications**, including online registration, confirmation notices, purchase orders, registration fees, payments via check and credit card, invoicing and refunds;
12. Develop and conduct a **media-relations campaign** that results in coverage of *Housing Washington* and its major messages to the community; publicize the *Friend of Housing* awards program across Washington State and in specific communities.
13. Execute a **sponsor visibility program** to add value to their sponsorship and keep them coming back year after year. This will include exhibit space, logo identification on web site visibility through social media outlets, new and creative benefit enhancements, and other forms of special recognition;
14. Coordinate and manage all **on-site activities and logistics**, including comprehensive facility management and logistics, A/V services, signage, facilitators, meeting room assignments and monitors, room set-up, menus, exhibits, décor, shuttle service, off-site receptions, coordinating ad-hoc meetings, etc.;
15. In the event of a virtual conference for *Housing Washington* any given year, plan and coordinate all necessary on-line subcontractors to deliver a secure and reliable virtual conference including all related logistics, filming of sessions, coordination of speaker and attendee access, etc.
16. Work with exhibitors and host facility or decorator service company to ensure proper **exhibit set-up**, move-in and move-out, management of set-up of exhibit spaces, exhibit drayage, etc.
17. Coordinate all aspects of **special events** featured at the Housing Washington conference, including receptions, ceremonies, special trainings, and similar virtual or in-person events;
18. Provide **support to dignitaries** at the conference, including **scripting** of podium announcements and speaker introductions, facilitating speaker/sponsor introductions, etc.;
19. Manage comprehensive conference **financial management services**, including a credit card payment option for sponsors, exhibitors and registrants, review of all invoices and secure client approval, obtain relevant W8 and W9 tax forms, and manage the tax filing process, etc.;

20. **Survey the attendees** and compile a full evaluation of the conference overall, as well as keynote addresses and each breakout session and workshop;
21. Draft a **comprehensive conference summary report**, including detailed analysis of all aspects of the conference; prepare and provide the contract manager with a financial report regarding income and expenses following each conference.
22. Sustain a high level of **client contact** and communication to be responsive to client needs, internal reporting requirements and to integrate the activities of the conference into other strategic goals of the Commission, as needed;
23. **Research and negotiate facilities** and advise on final facilities contracts for 2026, 2027, and 2028 conference sites, as well as hotel meeting rooms and other accommodations. Present client with written, negotiated options and secure contracts with selected facilities upon client approval.
24. Work directly with contract manager on all aspects of the *Housing Washington* conference planning and future strategies, concept development, contract negotiation and execution.
25. **Recommend** options for strategic direction of the conference from year to year, as well as **creative tactics** to increase the value of the conference to the affordable housing constituent groups that the Commission partners with and serves.

### **EXPECTED RESULTS UNDER THE CONTRACT**

The Commission expects to receive the following deliverable results from the selected contractor within the time frame of the contract:

1. The provision of professional services by qualified personnel to successfully achieve the tasks cited above.
2. A professional, positive and cooperative working relationship.
3. All documents, electronic production, copy, design, logos, graphic icons, and/or subsequent products become the exclusive property of the Commission, without qualification.

### **TERM OF THE CONTRACT**

The term of the contract will be from December 31, 2024 through December 31, 2026. The Commission reserves the right to extend the contract for up to two additional two-year periods at

the sole discretion of the Commission. The Commission reserves the right to terminate the contract on 30 days' notice to the contractors.

**COMMISSION SUPPORT FOR THE SELECTED CONTRACTOR**

The Commission's conference contract manager will coordinate the work of the contractor with the Commission staff and other persons as required for the completion of the contract; manage the contractor performance and budget process annually; act as chair of the planning team; act as point of contact for the contractor.

**MINIMUM QUALIFICATIONS**

- The Contractor must be licensed to do business in the state of Washington.
- The Contractor must have at least 10 years of experience in conference planning and/or event planning.
- The Contractor must have at least 10 years of experience with budget development and adherence, budget impact analysis and overall responsibility for the budgets and finances of conferences the contractor executes. Experience with working with public agencies is a valued qualification.

**COMMITMENT TO RACIAL EQUITY**

The Commission has made a commitment to become an anti-racist organization and will promote racial equity throughout its programs. Minority owned businesses are encouraged to apply.

**INTENT TO ENTER INTO ONE CONTRACT**

The contract contemplated as a result of this RFP will be between the Washington State Housing Finance Commission and one contractor only. Utilization of subcontractors and monitoring of their performance will be the responsibility of the contractor. Prior to the submission of the proposal, the Commission must approve any joint venture or sub-account. Any firm may be utilized for subcontracting or joint venturing purposes on more than one proposal.

**RFP COORDINATOR**

The RFP Coordinator is the sole point of contact in the Commission for this procurement. All communication between the Consultant and the Commission upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	Bob Peterson
Address	1000 Second Avenue, Suite 2700
City, State, Zip Code	Seattle, Washington 98104-1046
Phone Number	206-287-4454

Fax Number	206-587-5113
E-Mail Address	Bob.Peterson@wshfc.org

**Any other communication will be considered unofficial and non-binding on the Commission. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.**

**PROPRIETARY INFORMATION/PUBLIC DISCLOSURE**

All proposals will become the property of the Commission and will not be returned to the proposer.

All proposals received shall remain confidential until the contract is issued. If any contract resulting from this RFP is signed by the Executive Director of the Commission and the apparent successful Contractor, the proposals shall be deemed public records as defined in RCW 42.56.010(3), “Public Records.”

Any information in the proposal that the Consultant desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.56 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the Consultant is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word “Confidential” printed on the lower right-hand corner of the page.

The Commission will consider a Consultant’s request for exemption from disclosure; however, the Commission will make a decision predicated upon Chapter 42.56 RCW and Chapter 143-06 of the Washington Administrative Code. Marking the entire proposal exempt from disclosure will not be honored. The Consultant must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.56.120. No fee shall be charged for inspection of contract files, but twenty-four (24) hours notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

**METHOD AND SCHEDULE OF CONTRACT PAYMENT**

The selected contractor will be paid for completion of contract work per an established schedule and completion of specified tasks as outlined in the proposal and final contract. The selected contractor will submit a request for payment on the form and in the manner to be specified by the Commission in accordance with established requirements. For final payment the Commission

reserves the right to withhold not less than 20 percent of the contract amount until all work is completed to the Commission's satisfaction.

### **REVISIONS TO THE RFP**

In the event it becomes necessary to revise any part of this RFP, addenda will be provided via Washington State's WEBS system and by e-mail to all who were sent the RFP directly. The Commission also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

### **CRITERIA FOR EVALUATING PROPOSALS**

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals will be accomplished by an evaluation team to be designated by the Commission, which will determine the ranking of the proposals. The Commission, at its sole discretion, may elect to select consultants as finalists for an oral interview.

The Commission will determine which proposal is the most responsive to the requirements of the RFP. The brevity and clarity of Sections I, II and III of the proposal as required in this RFP will be considered.

**Principal considerations will be qualifications/experience, approach, schedule, responsiveness, references and entire written proposal.**

The Commission reserves the right to award this contract to the consultant which will best meet the requirements of the RFP, and not necessarily to the consultant with the lowest bid. The experience and background of staff actually assigned to the project and previous successful experience will be important considerations.

### **REJECTION OF PROPOSALS**

The Commission reserves the right to reject any or all proposals prior to execution of the contract, with no penalty to the Commission. Respondents who have been selected for an interview will be notified of the decision after the selection of the contractor.

### **ORAL INTERVIEWS MAY BE REQUIRED**

Written submittals and oral interviews, if considered necessary, will be utilized in selecting the winning proposal. The Commission, at its sole discretion, may elect to select the top scoring finalists from the written evaluation for an oral presentation. The oral presentation will determine the apparently successful proposer. Commitments made by a consultant at the oral interview, if any, will be considered binding.

## **COSTS TO PROPOSE**

The Commission will not be liable for any costs incurred by the Consultant in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

## **NOTIFICATION TO CONSULTANTS**

Consultants whose proposals have not been selected for further consideration will be notified via telephone or e-mail.

## **DEBRIEFING OF UNSUCCESSFUL CONSULTANTS**

Only consultants who have submitted a proposal under the criteria established by the Commission may protest the rejection of a proposal and request a debriefing. Upon request a debriefing will be scheduled with an unsuccessful consultant. The request for a debriefing must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Bidder Letter is faxed or e-mailed to the bidder. The debriefing must be held within three (3) business days of the request.

Discussion will be limited to a critique of the requesting consultant's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of one hour.

## **PROTEST PROCEDURE**

This procedure is available to consultants who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the consultant is allowed three (3) business days to file a protest of the solicitation with the RFP Coordinator. Protests must be submitted by email and must be followed by the original document. Bidders protesting this solicitation must follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to bidders under this solicitation.

All protests must be in writing and signed by the protesting party or authorized Agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested must also be included. All protests will be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of an evaluator.
- Errors in computing the score.
- Non-compliance with procedures described in the procurement document or Commission policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address such issues as: (1) an evaluator's professional judgment on the quality of the proposal, or (2) the Commission's assessment of its own and/or other agencies needs or requirements.

Upon receipt of a protest, a protest review will be held by the Commission. The Director of the Commission or an employee delegated by the Director who was not involved in the procurement will consider the record and all facts available and issue a decision within five (5) business days of receipt of the protest unless additional time is required, in which case the protesting party will be notified by the Commission.

In the event a protest may affect the interest of another consultant that submitted a proposal, such consultant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold the Commission’s action; or
- Find only technical or harmless errors in the Commission’s solicitation process and determine the Commission to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide the Commission options which may include:
  1. Correct the errors and re-evaluate all proposals and/or
  2. Reissue the solicitation document and begin a new process, or
  3. Make other findings and determine other courses of action as appropriate.

If the Commission determines that the protest was without merit, the Commission will enter into a contract with the apparently successful contractor. If the protest is determined to have merit one of the alternatives noted in the preceding paragraph will be taken.

## **SCHEDULE**

<b>Issue RFP</b>	<b>Friday, August 16, 2024</b>
<b>RFP Pre-Bid Conference: Time</b>	<b>Friday, August 30, 2024, 10:00 AM Prevailing Pacific</b>
<b>First Q&amp;A Posted:</b>	<b>Friday, September 6, 2024</b>
<b>Last Questions Accepted: Time</b>	<b>Tuesday, October 22, 2024, 5:00PM Prevailing Pacific</b>
<b>Last Q&amp;A Posted:</b>	<b>Tuesday, October 24, 2024</b>
<b>Proposal deadline: Time</b>	<b>Friday, October 25, 2024, 5:00 PM Prevailing Pacific</b>
<b>Interviews, if required:</b>	<b>November 4-8, 2024</b>
<b>Announcement of Apparent Successful Bidder</b>	<b>November 18-22, 2024</b>



**A. Approach and Methodology:** Describe your specific approach and proposed work plan to accomplish the deliverables. Include information about your project management system and how you would ensure responsive collaboration and communication with the Commission and stakeholders.

**B. Schedule:** Describe your ability to meet the Commission’s production schedule. Include your timeline, indicating the amount of time you are estimating for each deliverable.

**C. Firm Experience:** Describe the experience and qualifications of your firm to successfully complete this work with specific reference to the qualification’s requirement of this solicitation. Include a description of the most comparable work performed during the past two years. Include your experience with virtual conference delivery, including specific platforms.

**D. Staff Qualifications:** Provide a description of individual personnel assigned to the contract. Include for each person:

- Name, position description.
- Starting date of employment with the firm and the proposed time percentage that would be spent on this contract.
- Education, expertise, relevant skills, etc.
- Past success with similar projects

*The bidder must commit that the individuals proposed in its proposal will actually perform the contracted services.*

**F. References.** List names, addresses, telephone numbers, and e-mail addresses of three business references for which **comparable work has been performed within the past two years**. For each reference include a brief description of the type of service provided. The consultant and staff proposed to provide the services must grant the Commission permission to contact references, and others, who may have pertinent information. References may be contacted for the top scoring proposal(s) only.

**Section III:**

**Service Costs**

Information on the proposed cost of the contract in the following format:

- A maximum dollar amount for each service under this proposed contract including a not-to-exceed total dollar amount for provision of services under this proposed contract.
- A breakdown of the estimated hours each person assigned to the project will work and the hourly rate assigned to each person.

Conference	Firm providing	Job title of	Estimated	Estimated	Total
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Service	services	person responsible	Hours	cost per hour	

**ADDITIONAL MATERIAL**

Proposers may include any other relevant information that would be helpful to the Commission in evaluating your firm’s qualifications in a fourth section, if desired.

**BREVITY AND CLARITY OF PROPOSALS**

The brevity and clarity of Sections I, II, and III of the proposal will be considered in the selection of the contractor.

**CONTRACT GENERAL TERMS AND CONDITIONS**

The successful applicant will be expected to enter into a contract generated by the Commission in accordance with guidelines provided by the State of Washington, including its general terms and conditions and other standard provisions customary to such contractual agreements. In no event is the applicant to submit its own standard terms and conditions in response to this procurement. The applicant may submit exceptions to the general terms and conditions. The Commission will review requested exceptions and accept or reject the same in its sole discretion.

**Insurance Coverage**

The selected contractor is to furnish the Commission with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The contractor shall, at its own expense, obtain and keep in force insurance coverage that shall be maintained in full force and effect during the term of the contract. The contractor shall furnish evidence in the form of a Certificate of Insurance that insurance has been provided, and a copy shall be forwarded to the Commission within fifteen (15) days of the contract effective date.

### **Liability Insurance**

Contractor shall maintain commercial general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the “each occurrence” limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the “each occurrence” limit. All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract) and contain separation of insured’s (cross liability) condition.

Additionally, the contractor is responsible for ensuring that any sub-contractors provide adequate insurance coverage for the activities arising out of subcontracts. In the event that services delivered pursuant to this contract involve the use of vehicles, either owned or unowned by the contractor, automobile liability insurance shall be required. The minimum limit for automobile liability is \$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.

The insurance required shall be issued by an insurance company/ies authorized to do business within the state of Washington, and shall name the state of Washington, its agents and employees as additional insureds under the insurance policy/ies.

All policies shall be primary to any other valid and collectable insurance. Contractor shall instruct the insurers to give the Commission thirty (30) calendar days advance notice of any insurance cancellation.

Contractor shall submit to the Commission within fifteen (15) calendar days of the contract effective date, a certificate of insurance that outlines the coverage and limits defined in the Insurance section. Contractor shall submit renewal certificates as appropriate during the term of the contract.

### **Employers Liability (“Stop Gap”) Insurance**

In addition, the contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

### **Additional Provisions**

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The Washington State Housing Finance Commission, its elected and appointed officials, agents, and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with the contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the Commission.
2. **Cancellation.** Washington State Housing Finance Commission shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the

Insurance Commissioner): The insurer shall give the State forty-five (45) days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given twenty (20) days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given ten (10) days advance notice of cancellation.

3. Identification. Policy must reference the State's contract number and the agency name.
4. Insurance Carrier Rating. All insurance and bonds should be issued by companies admitted to do business within the state of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best's Reports. Any exception shall be reviewed and approved by Washington State Housing Finance Commission. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with Chapter 48.15 RCW and 284-15 WAC.
  4. Excess Coverage. By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect contractor, and such coverage and limits shall not limit contractor's liability under the indemnities and reimbursements granted to the State in this contract.

### **Worker's Compensation Coverage**

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable.