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## **REQUEST FOR PROPOSALS** **RFP# 17-01**

### **Branding Services**

In an effort to create, promote and maintain a positive public perception of Harris County Housing Authority (HCHA) and its activities, HCHA is seeking proposals from professional public relations and marketing firm(s) to provide branding services. Proposals should address how the consulting firm(s) would help achieve the strategic objectives of HCHA by effectively branding itself as stated in this RFP.

The deadline for proposals to be submitted is **4:00 p.m. (CST), Tuesday, February 07, 2017.** Proposals may be delivered to Timika Simmons, Director of Public Affairs, Harris County Housing Authority, 8933 Interchange Drive, Houston, Texas 77054.

Firms desiring any explanation of this RFP may inquire in writing to Timika Simmons at **Timika.simmons@hchatexas.org** or via fax to 713-669-4594 **by close of business day, January 24, 2016.**

Late submissions will be handled in accordance with the provisions in Form HUD-5369-B titled "Late Submissions, Modifications, and Withdrawal of Offers." Proposals will be held in confidence and not released in any manner until after the contract award.

Proposals will be evaluated on the criteria stated in the RFP. Negotiations may be conducted with offerors who have a reasonable chance of being selected for the award. After evaluation of the proposal and revisions, if any, the contract will be awarded to the responsible firm(s) whose qualifications, price and other factors considered are the most advantageous to HCHA.

HCHA reserves the right to reject any and all proposals.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Horace Allison  
Chief Executive Officer  
Harris County Housing Authority

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Attachment G: Conflict of Interest Questionnaire (CIQ)

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## **1.0 PROFILE OF HARRIS COUNTY HOUSING AUTHORITY**

Harris County Housing Authority's mission is to promote innovative housing communities and encourage clients to achieve self-sufficiency. HCHA is currently governed by the Housing Authorities Law, codified in the Texas Local Government Code. It is a unit of government and its functions are essential governmental functions. It operates and manages its housing programs to provide decent, safe, sanitary and affordable housing to low income families, the elderly, and the disabled, and implements various programs designed and funded by HUD. HCHA is a Public Housing Agency.

The property of HCHA is used for essential public and governmental purposes. HCHA and its property are exempt from all taxes, including sales tax on all its purchases of supplies and services.

HCHA enters into and executes contracts and other instruments that are necessary and convenient to the exercise of its powers.

HCHA maintains contractual arrangements to manage and operate affordable housing program and administers the Section 8 Housing Choice Voucher Programs. HCHA's programs are federally funded along with development grants and rental income.

HCHA currently employs 38 regular full time staff, owns and manages over 1,038 affordable housing units and administers rental assistance for 4100 privately owned rental units through the Section 8 (Housing Choice Voucher/HCV) programs. HCHA's total operating and development budget for the fiscal year 2016 is approximately \$5.3 million.

## **2.0 INTRODUCTION**

Harris County Housing Authority (HCHA) requests proposals to provide branding services. The selected organization will be asked to work in close collaboration with and in support of HCHA's Public Affairs Director in the development of HCHA's brand.

As a government organization that receives public funding, HCHA is committed to the effective and efficient use of its limited marketing budget. The proposed contract period for services is through the end of **April 2017**.

## **3.0 BACKGROUND ON THE HCHA BRAND**

- To date, no formal brand exploration or marketing has been done for HCHA.
- Until 2016, marketing activities were a hybrid role shared between leadership staff and board members.
- HCHA's brand suffered setbacks in past years.
- Previously, HCHA's brand name was unique in the marketplace with an outstanding reputation; essentially, business came to HCHA. Now, with much opposition to affordable housing and drastic changes in legislature, HCHA is working to align itself with community partnerships again.

- We believe the HCHA name is well-known and highly regarded within the housing community, but the brand, breadth of services, and value added propositions need to be well articulated and understood in the marketplace.
- In recent years, a new HCHA logo was developed and the website was simplified.
- HCHA's developments and its HCV programs are strengths of our brand nationally and have been recognized for their excellence and quality.
- In recent years, HCHA hired a new CEO and created a public affairs department to rebuild brand value and relationships with elected officials, key organizations, community leaders, and influencers.

#### **4.0 SCOPE OF SERVICES**

We seek a consulting firm with a proven track record for creative excellence in brand development and execution. Responsibilities of the successful Consultant(s) will include, but are not limited to:

- Phase I
  - Evaluate whether our name, Harris County Housing Authority and its affiliates, is broad enough for the organization's rapidly growing portfolio of diverse services, multiple business divisions and partnerships including, but not limited to: Public-Private Affordable Housing Partnerships, Private-Private Affordable Housing Partnerships, Housing Choice Vouchers (HCV) program, Veterans Affairs Supportive Housing (VASH) program, homeownership program, and senior housing programs.
  - Develop a brand platform for HCHA and its affiliates which will include positioning, personality, promise, differentiation, and value proposition.
  - Develop a comprehensive brand strategy (which includes brand architecture) for a multifaceted brand that addresses relationships between brands, naming conventions, and service/program brand groupings.
  - Proactively and effectively address anticipated or unforeseen complex or controversial communication issues.
- Phase II
  - Create the brand identity including naming, logo design, and brand identity standards/guidelines/systems.
  - Create a communications plan for HCHA's programs.
  - Develop a strategy to gain organizational consensus for the brand's position.
  - Assist HCHA in the creation of necessary collateral materials.

## 5.0 QUALIFICATIONS

Minimum Qualifications:

- The Consultant(s) shall be an established firm(s) engaged in the business of developing and implementing communications and public relations programs. The Principals of the firm(s) will have a minimum of five years of experience in establishing public relations initiatives.
- The Consultant(s) shall have qualified key personnel and staff with experience in communications and public relations services.
- The Consultant(s) shall have experience working with non-profit, government and/or affordable housing agencies.
- It is essential that the Consultant(s) have the necessary knowledge, skills and experience to implement all aspects of the work.
- All work is to be performed with the highest degree of professional standards, in compliance with HUD regulations, HCHA procedures, criteria and requirements and State and Local Laws and regulations.

## 6.0 PROPOSED RFP SCHEDULE

- RFP advertised, **Sunday, January 15, 2017, and Sunday, January 22, 2017**
- RFP published on HCHA website, **Monday, January 16, 2017**
- Questions regarding this RFP are due in writing to HCHA by **close of business day, Tuesday, January 24, 2017**
- Answers to questions posted to HCHA website, **Friday, January 27, 2017**
- Proposals due to HCHA by **4:00 pm CST, Tuesday, February 7, 2017**
- Schedule award, **Wednesday, February 15, 2017**

## 7.0 DELIVERABLES

### **Proposal Due Date/Time**

One (1) original proposal and five (5) copies must be submitted on or before **4:00 p.m. CST on Tuesday, February 06, 2017** to: **Harris County Housing Authority, Attn: Timika Simmons, Office of Public Affairs, 8933 Interchange, Houston, Texas 77054.**

Offerors are solely responsible for ensuring that their proposals are actually received by the time and date stated. Receipt by the HCHA after the due date and time specified will be cause for rejection.

All costs incurred in preparing and submitting proposals and in supplying supplementary information shall be borne by offerors. HCHA will not defray any costs incurred in connection therewith.

**The complete proposal package must be submitted in a sealed envelope labeled:**

***“ Request for Proposals (RFP) # 17-01 ”***

***Branding Services***

***Attn: Timika Simmons***

***Harris County Housing Authority, 8933 Interchange Drive, Houston, Texas 77054***

## **Modifications or Withdrawals**

Proposals may not be changed, modified, or withdrawn for 90 calendar days after the time and date specified for proposal submission. All requests to change, modify or withdraw a proposal prior to the proposal due date must be in writing and bear the same consultant(s) name appearing on the proposal already submitted.

## **8.0 CORRESPONDENCE**

Requests for additional information related to this RFP should be made in writing no later than **Tuesday, January 24, 2017**. Questions should be sent via mail to **Timika Simmons, Director of Public Affairs, 8933 Interchange, Houston, Texas 77054, via email to [timika.simmons@hchatexas.org](mailto:timika.simmons@hchatexas.org), or via fax to 713-669-4594**. This will allow time for issuance of any necessary amendment to the RFP.

An amendment may be issued prior to the opening of proposals for the purpose of changing or clarifying the intent of this RFP. All amendments shall be binding in the same way as if originally written in this RFP. Amendment(s) issued will be posted on the HCHA website at [www.hchatexas.org](http://www.hchatexas.org).

Any interpretation affecting all consultant(s) made prior to the proposal due date will be issued in the form of an amendment. HCHA will not be bound by or responsible for any other explanations or interpretations of this RFP package other than those given in writing as set forth in this paragraph. Oral instructions, interpretations, or representations will not be binding upon HCHA or any HCHA representatives.

Subcontractor(s) and others who have been requested by the consultant(s) to assist in preparing a proposal shall obtain necessary information from the consultant(s). They shall not directly contact HCHA or any HCHA representatives for this information.

Proposals will not be publicly opened and read.

## **9.0 PROPOSAL REQUIREMENTS**

### **9.1 Document Requirements**

The following is a description of the minimum information, which must be supplied by Consultant(s) in their proposals. All Consultant(s) may provide such

supplementary facts or materials that they consider may be of assistance in the evaluation of the proposal submission. Proposals that omit critical elements may be considered non-responsive. Each proposal shall include a Table of Contents listing the proposal contents. Proposal packages must contain, at a minimum, the following information and materials:

## 9.2 **Table of Contents**

## 9.3 **Executive Summary**

Provide a brief summary of your firm's approach to the work associated with the requested services, to include an understanding of the scope of services required and unique or innovative approaches to be utilized in performing these services.

## 9.4 **Resume and References**

A resume of the offeror and three (3) references must be submitted with each proposal. The proposal should address how the Consultant would help achieve the strategic objectives of Harris County Housing Authority in effectively communicating its services to the public as stated in this RFP.

For each reference include:

- ◆ The term of your contract agreement(s).
- ◆ A brief description of the scope of services.
- ◆ The name, address, and telephone number of the individual that administered your contract(s).

Include a list of references pertaining to the firm's performance on projects of similar type, scale and complexity. Offers must submit a least three (3) references. The Consultant's risk of non-performance or poor performance will be evaluated based on reference checks. The evaluation will take into account the currency, context and relevancy of information examined, as well as general trends in the Consultant's performance.

## 9.5 **Geographic Location and Accessibility**

State the full name and address of your firm(s) and, if applicable, the branch office that will perform the work on this project. Please describe your firm's location with respect to HCHA's offices located at 8933 Interchange Drive. Thoroughly explain what steps will be taken to enhance accessibility and minimize potential problems in the areas of availability for meetings, general communications, supervision, and expenses.

## 9.6 **List of project lead and all key members of the firm and any consultant who will be committed to this project. Indicate the level of effort and function of each member of the project. Prepare organization structure to show how the**



key members will be involved. Include resumes of these individuals. The resumes should include the following minimum information:

- ◆ Name
- ◆ An explanation of the function they will perform and their title by classification.
- ◆ Relevant educational background.
- ◆ Relevant work experience.
- ◆ Work experience with governmental clients.
- ◆ Any specialized skills, training, and/or credentials that will be relevant to the required services.

#### **9.7 Sub-contracting the Work**

If the offeror intends to use subcontractors in the performance of the work, the subcontractor name(s) and description of the work to be subcontracted must be provided with the offeror's proposal. The percentage of work to be performed by each should also be listed.

#### **9.8 Past Performance on Similar Assignments**

HCHA is seeking a firm(s) with extensive experience in rebranding services to government agencies, companies in the public sector, non-profit agencies, agencies administered by HUD and/or other housing authorities. List your firm(s) previous rebranding experience with the public sector, affordable housing, the Section 8 Housing Choice Voucher Program, HUD and governmental entities. Provide an overview of the services provided to the governmental or non-profit entities that your firm(s) has represented or provided substantial support on matters affecting public relations, communications, and rebranding.

Additionally, provide any experience the firm(s) has with promoting single-family housing, multi-family housing, affordable housing, market rate housing, mixed income housing, mixed-use developments, transit oriented developments and the low-income housing tax credit program. For each project, briefly state the nature, scope of services, fee basis, contact person and telephone number.

#### **9.9 Management Plan and/or Approach**

Describe your firm's plan for managing the services in response to this RFP, including the role that the HCHA will play. Explain the role that the Consultant(s) will play and the methods of communication and control.

#### **9.10 Technical or Work Plan**

Describe the firm's technical/work plan for accomplishing all elements of the Work.

Discuss the firm's approach during each phase and the results that would be achieved. State any possible problem areas that may exist and how they will be addressed.

#### **9.11 Financial Capacity**

Statement that the firm is financially sound and has financial resources sufficient to successfully execute this prospective HCHA agreement in the time frame outlined. Provide an audited financial statement of the firm upon request of HCHA.

### 9.12 Insurance Requirements

Provide evidence of all appropriate and applicable insurance coverage carried by the firm, including policy coverage periods. Offerors shall furnish HCHA with certificates of insurance showing that the following insurance is in force and will insure all operations under this RFP, and name HCHA as an additional insured. Required insurance levels are as follows:

Provide evidence of Workers' compensation in accordance with the State of Texas rules and regulations.

General liability insurance with a single limit for bodily injury of \$1,000,000 per occurrence and property damage limit of no less than \$1,000,000 per occurrence. The insurance may have a combined aggregate of coverage amounting to no less than \$1,000,000. Such insurance shall protect Offeror against claims of bodily injury or death and property damage to others. The insurance shall cover the use of all equipment, hoists and vehicles used on the site(s) not covered by offeror's automobile liability. If Offeror has a "claims made policy," then the following additional requirements apply: The policy must provide a "retroactive date" which must be on or before the execution date of the Agreement and the extended reporting period may not be less than five years following the completion date of the Agreement.

Automobile liability on owned and non-owned motor vehicles used on the site(s) or in connection herewith for a combined single limit of bodily injury and property damage of not less than \$1,000,000 per occurrence.

All insurance shall be carried with companies that are financially responsible and admitted to do business in the State of Texas. Offeror shall not permit the insurance policies required to lapse during the period for which the Agreement is in effect. All certificates of insurance shall provide that no coverage may be cancelled or non-renewed by the insurance company until at least thirty (30) day's prior written notice has been given to HCHA.

### 9.13 Certifications and Affidavits

Offerors shall submit the following certifications and affidavit as attached:

- Attachment A: Proposed Fee Schedule
- Attachment B: Form of Non-Collusive Affidavit
- Attachment C: M/WBE Participation Form
- Attachment E: Certifications and Representations of Offerors for Non Construction Contracts (Form HUD 5369-C)
- Attachment G: Conflict of Interest Questionnaire (CIQ)

**9.14 Basis of Proposal**

The successful offeror(s) will be expected to execute a standard professional service contract with HCHA.

Offerors are advised to check that all parts of this RFP package have been received. Offerors shall be responsible for informing themselves with respect to all conditions, which might in any way affect the cost or performance of any of the work. Failure to do so shall be at the sole risk of the offeror and no relief shall be given for errors or omissions by the offeror.

Partial or incomplete proposals will be unacceptable.

An authorized representative of the offeror must sign proposals.

**9.15 Validity of Proposals**

Proposals must be open and not subject to unilateral withdrawal or modification for ninety (90) days after the proposal due date.

Firms are requested to submit proposals based on the exact requirements specified in this RFP.

All costs incurred in preparing and submitting proposals and in supplying supplementary information shall be borne by contractors. HCHA will not defray any costs incurred in connection therewith.

**10.0 EVALUATION CRITERIA**

Proposals will be evaluated by an HCHA Selection Committee. The Selection Committee will present its recommendations to HCHA's Board of Commissioners who will make the final decision.

Proposals will be evaluated using the Evaluation Criteria outlined below. After the initial scoring of the proposals, those deemed to be within the competitive range by the Selection Committee will become the finalists and may be asked to appear for an oral interview to clarify issues and, if necessary, following the interview, to submit "best and final" offers.

After the interviews and, if necessary, the receipt of the best and final offers, each of those respondents will be re-evaluated and re-scored. The respondent with the highest overall score whose proposal is most advantageous to HCHA in regards to price, technicality and other factors as specified in this RFP will be recommended to the Board as HCHA's Communication and Public Relations Consultant.

Selection of the successful Respondent will be at the sole discretion of HCHA. Additionally, HCHA shall have the right to reject any and all proposals at its discretion or

to waive any minor irregularities or technicalities in proposals received as is in the best interest of HCHA.

An HCHA evaluation team will be established to review consultant(s) responses to this RFP. Proposals will be evaluated by, but not limited to, the following criteria:

<b>Evaluation Criteria</b>	<b>Maximum Points</b>
1) Geographic Location and Accessibility	10
2) Firm's past performance and experience with similar projects.	15
3) Resumes of all key personnel and references.	15
4) Management Plan and/or Approach	15
5) Technical Plan or Work Plan	15
6) Financial Capacity	10
7) Reasonableness of contract price.	20
8) Offeror's compliance with all specifications and/or other requirements contained in this RFP.	10
<b>Total Initial Points</b>	<b>110</b>
9) Interview and Presentation	<b>20</b>
<b>Total Overall Points</b>	<b>130</b>

11.0 **CONTRACT TERM**

The contract shall be effective upon the date of execution and shall be in effect for a period through **April 2017** with an option, at HCHA's discretion, to extend for additional months. The Branding contract will be a fixed price contract and the terms of which will be negotiated between the HCHA and the selected consultant.

12.0 **AVAILABILITY OF RECORDS**

The U. S. Department of Housing and Urban Development (HUD), the Office of Inspector General of the United States (OIG), HCHA, and any duly authorized representatives of each, shall have access to and the right to examine any and all pertinent books, records, documents, invoices, papers, and the like, of the firm(s) office or firm, which shall relate to the performance of the services to be provided. All pertinent records of the firm(s) must be maintained for a period not less than three (3) years after final payment has been made and all pending matters closed

13.0 **STANARDS OF CONDUCT**

The successful consultant(s) shall be responsible for maintaining satisfactory standards of employees' competency, conduct, courtesy, appearance, honesty, integrity, and shall be responsible for taking such disciplinary action with respect to any employee, as may be necessary.

#### 14.0 **AVAILABILITY OF FUNDS**

In the event that funds necessary to finance this Professional Services Contract become unavailable, HCHA may cancel the contract by giving seven (7) days' notice in writing and the contract will thereafter be null and void. HCHA shall be the final authority to determine whether funds are not available.

#### 15.0 **CONFLICT OF INTEREST**

No employee, officer or agent of HCHA shall participate directly or indirectly in the selection or in the award of any contract if a conflict, real or apparent, would be involved. Such conflict would arise when a financial or other interest in an agency selected for award is held by:

- an employee, officer or agent involved in making the award; or
- his/her relative including father, mother, son, daughter, brother, sister, uncle, aunt, first cousin, nephew, niece, husband, wife, domestic partner, father-in-law, mother-in-law, son-in-law, daughter-in-law, brother-in-law, sister-in-law, stepfather, stepmother, stepson, stepdaughter, stepbrother, stepsister, half brother, or half sister; or
- his/her business or professional partner; or
- an organization which employs is negotiating to employ or has an arrangement concerning prospective employment of any of the above.

#### 16.0 **CONDITIONS AND LIMITATIONS**

This RFP does not represent a commitment or offer by HCHA to enter into contract(s), or other agreement with a proposer. All costs incurred in the preparation of this proposal are to be borne by the proposer. The proposal and any information made a part of the proposal will become a part of HCHA's official files without any obligation on HCHA's part to return it to the individual proposer. This RFP and the selected agency's proposal will, by reference, become a part of any formal agreement between the agency(ies) and HCHA resulting from this solicitation.

HCHA reserves the right to waive any irregularities or formalities in any or all proposals or any part thereof. Failure to furnish all information requested may disqualify a proposer.

HCHA reserves the right to request clarification of proposal data without changing the terms of the proposal.

The contractor shall not offer any gratuities, favors, or anything of monetary value to any official or employee of HCHA for the purpose of influencing consideration of a proposal.

The contractor shall not collude in any manner or engage in any practices with any other proposer(s), which may restrict or eliminate competition or otherwise restrain trade. Violation of this instruction will cause the proposal to be rejected. This prohibition is not intended to preclude joint ventures or subcontracts.

17.0 **MINORITY/WOMEN BUSINESS PARTICIPATION**

The firm(s) awarded the contract agrees to utilize its good faith and best efforts to subcontract with minority business enterprises and women business enterprises (herein called M/WBE) certified as such or recognized by HCHA as such. The Offeror shall use its best efforts to attempt to subcontract a sufficient dollar amount with M/WBEs in an effort to meet the HCHA goal of a minimum of 30 percent of the final contract dollars are expended on one or more M/WBEs including all adjustments that cause the contract price to increase.

18.0 **PERTINENT FEDERAL REGULATIONS WITH REGARD TO NONDISCRIMINATION AND EQUAL OPPORTUNITY**

The requirements of Title VIII of the Civil Rights Act of 1968 and Title VI of the Civil Rights Act of 1964, relating to prohibitions against discrimination in housing and the benefits of federally funded programs because of race, color, religion, sex or national origin must be met by the offeror.

The offeror must adhere to federal regulations prohibiting discrimination on the basis of age under the Age Discrimination Act of 1975, and prohibit discrimination against handicapped individuals under Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act of 1990.

The requirements of Executive Order 11246, relating to equal employment opportunity in connection with federally funded programs must be met by the offeror.

The offeror must also meet the requirements of Section 3 of the Housing and Urban Development Act of 1968, relating to the training and employment of individuals, and contracting for business opportunities in metropolitan areas in which federally funded programs are being operated.

The offeror must meet the requirements of Executive Orders 11625, 12432, and 12138 relating to the use of minority and women's business enterprises in connection with federally funded programs.

19.0 **PROPOSED FEE SCHEDULE**

Provide a detailed fee proposal which outlines the specific activities that will be performed during the branding process outlined in Attachment A.



**ATTACHMENT A**

**PROPOSED FEE SCHEDULE**

<b>Service</b>	<b>Description of activities/services</b>	<b>Fee</b>
Brand Evaluation		
Development of Brand Platform		
Development of Brand Strategy		
Development of Brand Identity		
Brand Implementation and Stewardship Plan		
Development of Collateral		
Other included services		
Total Estimated Cost		



**ATTACHMENT B**  
**FORM OF NON-COLLUSIVE AFFIDAVIT**

STATE OF TEXAS

COUNTY OF HARRIS

\_\_\_\_\_, being first duly sworn, deposes and says that he is

\_\_\_\_\_  
(a partner or officer of the firm of, etc.)

the party making the foregoing proposal or bid, that such proposal or bid is genuine and not collusive or sham; that said bidder has not colluded, conspired, connived or agreed, directly or indirectly, in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference with any person to fix the bid price of affiant or of any other bidder, or to fix any overhead, profit, or cost element of said bid price, or of that of any other bidder, or to secure any advantage against

THE HARRIS COUNTY HOUSING AUTHORITY

of any person interested in the proposed Contract; and that all statements in said proposal or bid are true.

\_\_\_\_\_  
Signature of Bidder, if Bidder is an Individual

\_\_\_\_\_  
Signature of Bidder, if Bidder is a Partnership

\_\_\_\_\_  
Signature of Officer, if Bidder is a Corporation

Subscribed and sworn to before me this \_\_\_\_ day of \_\_\_\_\_, 2010

\_\_\_\_\_

**Notary Public**

My Commission expires \_\_\_\_\_



**ATTACHMENT D**  
**Form HUD-5369-B, Instructions to Offerors, Non-Construction**

**ATTACHMENT E**  
**Form HUD-5369-C, Certifications, and Representations of Offerors**

**ATTACHMENT F**  
**Form HUD-5370-C, General Contract Conditions, Non-Construction**

**ATTACHMENT G**  
**Conflict of Interest Questionnaire (CIQ)**

**ATTACHMENT H**  
**Section 3 Policy**

**ATTACHMENT I**  
**Ethics Policy**