

TASK ORDER SOLICITATION
ON-CALL PROFESSIONAL CONSULTANT SERVICES
MARKETING AND PUBLIC/MEDIA RELATIONS
AND
MANAGEMENT CONSULTING

**STRATEGIC PLAN
2027-2030
TOS FIN-MM-01**

CITY OF LOS ANGELES
OFFICE OF FINANCE

RAMPLA Opportunity ID No. 229261

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1. INTRODUCTION

The City of Los Angeles (City) Office of Finance (Department of Finance) seeks to hire a consultant to help prepare the Department's 2027-30 Strategic Plan (Plan). Finance seeks proposals through the Los Angeles Department of Transportation's On-Call Professional Consulting Services Bench in the Marketing and Public/Media Relations and Management Consulting service categories to develop a strategic plan framework that touches upon and enhances the Department's mission and vision statements, and core values. This Task Order Solicitation (TOS) outlines the scope of work, requirements, selection process, and documentation necessary to respond on this project. All Task Order Proposals (Proposal) are due by **3:00 p.m. PST on September 16, 2026**.

Finance continues to make significant strides toward accomplishing its goals, which include managing public finances honestly and transparently, serving the public with respect and helpfulness, and addressing the needs of the department through innovation, integrity, and equity. The Plan will mark the beginning of a new phase for the Department and should build upon the accomplishments achieved and lessons learned from implementing the 2023-26 Strategic Plan.

2. SCOPE OF WORK

2.1. BACKGROUND

Finance is responsible for overseeing public finances for the City. This includes collecting revenues through taxes (e.g., business, parking occupancy, transient occupancy, etc.), licenses, fees, permits, and being the custodian of all money deposited into the City Treasury and all securities purchased by the City. The Department manages and monitors the overall financial health of the City, where revenues are then used to fund City operations, programs, and projects that serve the City's stakeholders, from residents, visitors, and businesses. The Plan will focus on establishing Finance as a leader in public financial management and customer service.

The Department expects the publication to be printed by Friday, May 28, 2027. The Plan should have detailed goals, benchmarks, and metrics to guide and provide transparency and accountability to the public. Rather than starting from scratch, it will build upon the foundational accomplishments and lessons learned from the 2023-26 Strategic Plan, evolving our approach to be even more responsive and accessible. This next phase will focus on further integrating our vision as leading experts in revenue and investment for the City of Los Angeles.

Finance has twelve (12) divisions that support its operations. They include:

- Accounting
- Audit
- Billing and Revenue Processing
- Budget and Administrative Services

- Customer Support
- Enforcement
- Investments
- LATAX Transformation
- Revenue Management
- Specialized Taxes, Appeals, and Resources
- Systems
- Treasury Services

2.2.PROJECT STAFFING, ROLES, AND RESPONSIBILITIES

Finance, in its sole discretion, has the right to approve or disapprove of Contractor's personnel assigned to perform the services under this Task Order at any time throughout the term of this TOS. Finance will have the right to interview and review the qualifications of any new personnel not listed under "Contractor's Team" that are proposed by the Contractor. Any change to Contractor's personnel must be approved in writing by Finance at least fourteen (14) days in advance of assignment of such personnel by the Contractor. Such approval by Finance shall not be unreasonably withheld.

The Contractor will ensure that it completes all work and obligations described in this TOS. Finance's Project Manager will provide oversight of the project to ensure that the Contractor is meeting staffing, timeline, budget, and work product targets and deliverables described in this TOS. Finance will identify meeting rooms at no expense to the Contractor. The Contract Administrator will approve contract payments and provide oversight of all contract administration matters.

Finance will appoint the members of the Steering Committee for the Plan development. The Working Group will serve as the stakeholder group for the Plan development.

Project: 2027-2030 Strategic Plan Development
Agency: City of Los Angeles, Office of Finance
Strategic Plan Steering Committee: Members of this Committee include Finance's Executive Team, and other members designated by the Director of Finance. The members are: • Diana Mangioglu, Director of Finance • Angela Berumen, Assistant Director of Finance • Matthew Crawford, Assistant Director of Finance • LaRonda Lamothe, Assistant Director of Finance • Thomas Juarez, Chief Investment Officer • Andrew Kaplan, Revenue Manager • Anita Tang, Project Manager

Working Group: Finance employees who participate as stakeholders in developing the Strategic Plan will be known as the Working Group. The Working Group for the Plan development is anticipated to include Finance Division Heads and other staff. The list of participants will be provided by Finance.

Finance Team:

- Angela Berumen – Executive Sponsor
- Anita Tang – Project Manager
- Ricardo Estrada – Contract Administrator

2.3. SCOPE OVERVIEW

Finance seeks task order proposals from qualified consultants to develop a strategic plan framework for the Department that will act as the Department's roadmap for the next four (4) years. The Plan will identify department-wide goals and benchmarks and will incorporate existing financial and operational policies and objectives, while providing a framework by which to measure and achieve future goals. The Plan should build upon the foundational accomplishments and lessons learned from the 2023-26 Plan. It should be attractive and easy-to-read. The Plan will give the Department the opportunity to update how it best meets the challenges of the next four years. This project will be implemented in accordance with the terms and conditions of the On-Call Professional Consultant Services Contract between the Office of Finance and the selected consultant.

The Consultant will assist Finance to deliver key components of the Plan by:

- Conducting a comprehensive performance review to assess progress against the objectives and initiatives established in the Department's 2023-26 Strategic Plan
- Hosting, facilitating, and summarizing key stakeholder feedback
- Designing Strategic Plan priorities that align with Finance's preferred tracking method
- Preparing a beautifully designed document with high quality photos
- Supporting a department-wide roll-out of the Plan with graphics and printed materials to use for staff and stakeholder engagement
- Designing an updated official logo for the Office of Finance and developing a comprehensive style guide for use in Plan roll-out and general departmental communications

Skills associated with this project entail group facilitation, stakeholder interviews, process mapping, recommendations development, and report writing.

2.4. SCOPE OF SERVICES REQUIRED

The Consultant will provide details on how they will most effectively provide and coordinate the following key tasks, including deliverables for each, per the descriptions below. This will also include details on any optional work described below. The Project Manager will be responsible for forwarding feedback to the Consultant on behalf of the Department.

Please note that Finance has allocated approximately two hundred thousand dollars (\$200,000) for this scope of work (see Section 3 Project Budget below for additional details).

TASK 1: PROJECT MANAGEMENT AND INITIATION

The Consultant will conduct a Project Kick-Off meeting in coordination with the Department Steering Committee where Finance will brief the Consultant on the work to date and confirm Consultant scope, responsibilities, schedule of deliverables, and detailed work plan. This meeting will be held within two (2) weeks of Finance issuing to the Consultant a Notice to Proceed. The Consultant will work with the Finance Team and Consultant's sub consultants, if applicable, to set the agenda. The Consultant will schedule and coordinate conference calls/meetings with the Project Manager as deemed necessary by the Department. As part of these meetings, the Consultant will report on its progress on project tasks and deliverables for review (including labor hours, expenses, and deadlines), input decision-making, and approval by Finance. The Consultant will provide (in Google Docs format via email to the Project Manager) agendas AT LEAST one (1) business day in advance of every meeting and minutes/notes AT MOST two (2) business days following every meeting. Meetings may be held virtually or in person. Please note that these meetings are different from those outlined in Tasks 3.2 and 3.3.

The Consultant will create a project management folder on Google Drive where all project documents shall be stored. The Consultant will give Finance access to the Google Drive to edit and share documents. At the end of the Task Order, the Consultant will transfer ownership of the Google Drive and all of its documents to the Office of Finance.

- *Deliverable 1.1:* Project Kick-Off meeting, including draft detailed work plan, deliverable schedule, agenda, attendance, and meeting and follow-up notes within two (2) business days of said meeting.
- *Deliverable 1.2:* Final Project Work Plan, due one week after the Project Kick-Off Meeting.
- *Deliverable 1.3:* Meeting schedule with meetings every other week for the duration of this project, including the expectation that the agenda is provided at least one (1) business day in advance, attendance, and meeting notes are provided no more than two (2) business days following every meeting.

- *Deliverable 1.4:* Well-organized Google Drive folder with all relevant contract documents and work products to be handed over after the completion of this task order.

TASK 2: PERFORMANCE REVIEW OF EXISTING PLAN (2023-2026)

The Consultant will conduct a comprehensive performance review to assess the Department's progress against the objectives and initiatives across the four (4) Strategic Focus Areas (Process, Technology, Policy, Team) established in the [2023-26 Strategic Plan](#). To facilitate this assessment, the Consultant will utilize the first Steering Committee meeting (detailed further in Task 3.2) after the Project Kick-Off meeting as an information-gathering session to discuss current status of and milestones achieved. The Steering Committee will provide follow-up information and data as necessary for the Consultant to adequately assess the Department's progress. The Consultant will conduct individual interviews with Executive Staff to understand current operational statuses of initiatives, key successes, emerging challenges, and proposed strategic focus areas for the Plan. Additionally, Finance can facilitate interviews with other staff as needed in order for the Consultant to adequately assess progress. The Consultant will summarize notes for each interview and provide such notes in Google Docs format to the Project Manager via email within three (3) business days of the last interview. The Consultant will utilize the identified successes to inform updated goals and priorities for the 2027-2030 Plan.

The Consultant will utilize the interviews and data provided by Executive Staff to create a final, standalone progress report, detailing specific challenges encountered and an analysis of whether those barriers were within the Department's direct control. The report should be presented to the Steering Committee at a subsequent Steering Committee meeting.

- *Deliverable 2.1:* Summarized notes from the first Steering Committee meeting, provided in Google Docs format within three (3) business days.
- *Deliverable 2.2:* Completed interviews and interview summary, and provide notes in Google Doc format to the Steering Committee Team via e-mail within three (3) business days of the last individual interview.
- *Deliverable 2.3:* A final, standalone progress report including a high-level assessment of the 2023-26 Plan, detailing specific challenges encountered and an analysis of whether those barriers were within the Department's direct control. The report should be presented to the Steering Committee at a subsequent Steering Committee meeting.

TASK 3: PLAN DEVELOPMENT

3.1 PLAN DEVELOPMENT PROCESS

With multiple existing policies and priorities, Finance's strategic plan

development process requires a deliberate approach to define and set final content. The Consultant will draft a process map or workflow for the Plan. This deliverable will outline steps to develop and prioritize the Plan content. This is different from a detailed work plan. This process map helps establish how the Consultant will track all inputs (from stakeholder meetings, 2023-26 Plan progress report, etc.) to create a thoughtful end product for the Department.

- *Deliverable 3.1a:* Draft process map and submit to the Department's Project Manager via email.
- *Deliverable 3.1b:* Final process map and submit to the Department's Project Manager via email.

3.2 FACILITATED MEETINGS – STEERING COMMITTEE

The Consultant will engage the Steering Committee after key deliverables. Finance will provide the meeting locations; the Consultant will facilitate the meetings and take notes. The Consultant will provide written notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of the completed meeting.

The Consultant will facilitate one meeting with the Steering Committee to confirm and agree to Task 3.1 Plan Development Process above. This meeting will also be used as an information-gathering session to discuss current status and milestones achieved of the 2023-2026 Strategic Plan.

- *Deliverable 3.2a:* One (1) facilitated meeting regarding the Plan development process, including facilitation, note-taking, and submitting summary and meeting notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of said meeting.

The Consultant will facilitate one (1) meeting with the Steering Committee to present the final progress report on the 2023-26 Strategic Plan (Deliverable 2.3). This meeting should last at least two (2) hours.

The Consultant will facilitate two (2) meetings with the Steering Committee to review and shape the Plan content. These two (2) meetings are different from the meeting for the Plan development process above. Each meeting should last at least two (2) hours.

At the first meeting, the Consultant will present a rough draft of the Plan content, which will include a complete outline, identify key themes, but will not yet present detailed benchmarks. At the second meeting, the Consultant will present the first draft of the Plan content with detailed benchmarks.

- *Deliverable 3.2b:* One (1) facilitated meeting regarding the 2023-26 Strategic Plan progress report, including facilitation, note-taking, and submitting summary and meeting notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of said meeting.
- *Deliverable 3.2c:* Two (2) facilitated meetings developing the Plan content, including facilitation, note-taking, and submitting summary and meeting notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of said meeting.

The Consultant will facilitate two (2) meetings with the Steering Committee to review the final draft of the Plan content. Each meeting should last at least two (2) hours.

- *Deliverable 3.2d:* Two (2) facilitated meetings to review the detailed draft of Plan content, including facilitation, note-taking, and submitting summary and meeting notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of said meeting.

The Consultant will facilitate final meetings with each member of the Steering Committee individually to review the final draft of the Plan. Each meeting should last one (1) hour.

- *Deliverable 3.2e:* Meeting to discuss final draft of the Plan, including facilitation, note-taking, and submitting summary and meeting notes in Google Docs format to the Steering Committee via e-mail within three (3) business days of the last individual meeting.

3.3 FACILITATED MEETINGS – WORKING GROUP

The Consultant will facilitate ten (10) 1-hour meetings with each of the listed Finance Divisions to solicit input on the Plan as it develops:

- | | |
|---------------------------------------|---|
| 1. Accounting | 7. Investments and Treasury Services |
| 2. Audit | 8. LATAX Transformation and Systems |
| 3. Billing and Revenue Processing | 9. Revenue Management |
| 4. Budget and Administrative Services | 10. Specialized Taxes, Appeals, and Resources |
| 5. Customer Support | |
| 6. Enforcement | |

Finance will provide the Consultant with a list of participants for each Division meeting. Each meeting should last one (1) hour, and shall be engaging and interactive. Finance will find a meeting location. The Consultant will facilitate the meeting and take notes. The Consultant will

provide written notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of each completed meeting.

Additionally, the Consultant will facilitate two (2) meetings once the Plan content is final. The first meeting will be with the Steering Committee and Division Heads to provide both groups with a preview of the final Plan. The Consultant will also facilitate a second all-staff meeting with the entire Office of Finance to present the finalized Plan.

- *Deliverable 3.3a:* Ten (10) facilitated one-hour meetings, including facilitation, note-taking, and submitting summary and meeting notes in Google Docs format to the Department's Project Manager via e-mail within three (3) business days of each completed meeting.
- *Deliverable 3.3b:* One (1) preview meeting with the Finance Executive Team and Division Heads, including coordination and facilitation of the session.
- *Deliverable 3.3c:* One (1) all-staff presentation of the final Strategic Plan, including coordination and facilitation of the session.

3.4 STAFF SURVEYS

The Consultant will create and administer electronic surveys to engage all staff at Finance in providing input on the Plan as it develops. The Department will distribute the survey to all staff with a two-week response deadline. The Consultant will analyze and summarize the survey results within seven business days of survey deadlines and provide results and analysis of the survey to the Department's Project Manager via email within three (3) business days of the analyses and summary.

- *Deliverable 3.4:* Up to five (5) electronic surveys of Finance staff, including analytics and summary within seven (7) business days of the survey deadlines; submit results and analysis to the Department's Project Manager via email within three (3) business days of the completed analyses.

3.5 DEVELOP AND DRAFT PLAN CONTENT

The Consultant will draft and develop the Plan content. This document will evolve through the lifespan of the project. It should include details on where each benchmark or priority originated (i.e. [Finance's website](#), the 2023-26 Plan Progress Report (Task 2), interviews with Steering Committee Members, products of Working Group meetings, or other).

- *Deliverable 3.5:* Final draft of content in spreadsheet form to the Department's Project Manager via email.

TASK 4: REVIEW AND APPROVAL OF VISUAL CONCEPTS, GRAPHICS AND FINAL COPY

4.1 PRESENT VISUAL CONCEPTS

The Consultant will develop and present three (3) visual conceptual layouts for review. Each layout should include the following elements: color palette, front/back cover concept, and concept samples of at least three (3) interior page spread concepts. These publications will follow style guidelines as determined by the Strategic Plan Steering Committee. A minimum of twenty-five (25) original, professional-grade photos will be required to supplement existing assets. In addition to the twenty-five (25) original photos, the Consultant will provide professional-grade headshots of Finance's Executive Team and each Department Division Head.

- *Deliverable 4.1a:* Develop and present three (3) visual conceptual layouts.
- *Deliverable 4.1b:* Twenty-five (25) original, professional-grade photos.
- *Deliverable 4.1c:* Professional-grade headshots of Finance's Executive Team and each Department Division Head.

4.2 IDENTIFICATION OF PHOTOGRAPHS, CHARTS, GRAPHS, AND OTHER GRAPHICS

The Consultant will create a minimum of ten (10) charts, graphs, and other infographics to properly illustrate the text.

- *Deliverable 4.2:* A minimum of ten (10) charts, graphs, and other infographics to illustrate the text.

4.3 LAYOUT MOCK-UP

The Consultant will provide a full layout (in PDF format), including placeholders for content not yet available, at least two (2) months before the final Plan is set to be released. This will help expedite the review process and give the Department a full picture of how the Plan will look as an end product.

- *Deliverable 4.3:* Full layout mock-up.

4.4 RE-DRAFTS

The Consultant will expect multiple (at least three (3)) rounds of layout and

copy edits to the document. The Consultant will make all requested edits and layout changes in a timely manner.

- *Deliverable 4.4:* At least three (3) rounds of edits on layout and copy.

4.5 FINAL DRAFT

Final draft will be submitted within one (1) week from receipt of the Department's redline of the second draft. In the absence of errors by the Consultant in implementing previous requests, only minor text revisions are anticipated.

- *Deliverable 4.5:* Provide a Final Draft, within one (1) week of receiving the Department's edits on the second draft.

4.6 PROJECT BOARDS

The Consultant will develop at least five (5) well-designed Project Boards to clearly indicate to Finance staff and stakeholders the key components of the final Plan. The Project Boards will utilize professional graphics and text to illustrate strategic concepts and are intended for physical display in Department offices or digital publication on the Office of Finance website. These creative assets will serve as a high-level interpretation of the Plan to enhance internal and external departmental engagement and advertisement of the Plan.

- *Deliverable 4.6:* Develop at least five (5) project boards (budget shall include cost for preparation).

4.7 PERSONAL WORKSPACE GRAPHIC DISPLAY

The Consultant shall design and produce a motivational graphic display for deployment at each Finance employee's personal workspace. This display will utilize professional graphics and text to reinforce key strategic plan concepts, thereby enhancing employee engagement and fostering a shared commitment to the Department's objectives.

- *Deliverable 4.7:* Design and provide print-ready files for a personal workspace graphic display (mini poster) for each employee (budget shall include cost for preparation).

TASK 5: PUBLICATION

Finalize for publication by Friday, May 28, 2027, print and deliver to Finance offices the final report. For the purposes of cost estimation, presume six-color, full-bleed printing of five hundred (500) copies of approximately a 15-30-page publication.

- *Deliverable 5.1:* At least five hundred (500) full-bleed copies of the publication.
- *Deliverable 5.2:* An Adobe Acrobat-compatible (PDF) file of the entire report suitable for reprinting the publication.
- *Deliverable 5.3:* An Adobe Acrobat-compatible (PDF) file of the entire report with graphics optimized for online viewing and reduced file size.
- *Deliverable 5.4:* An Adobe InDesign-compatible folder of the entire report, including original graphics and links for re-use and republication as necessary.

TASK 6: ONLINE DASHBOARD

After the release of the Plan, the Consultant will create an online dashboard and tracking system that will live on Finance's internal website and be made available only to Finance and other City staff. The Dashboard will include a master spreadsheet to track progress but will also automate charts and graphics to illustrate progress.

- *Deliverable 6.1:* Create online project dashboard and tracking system.

TASK 7: LOGO REDESIGN AND BRAND STYLE GUIDE DEVELOPMENT

The Consultant shall redesign the Office of Finance's official logo to align visually and conceptually with the new Strategic Plan. Following the logo redesign, the Consultant will develop a comprehensive brand style guide. This guide will ensure consistency for Plan roll-out materials and general departmental communications, including, but not limited to, social media assets and a dedicated Google Slides presentation template for use in presentations to elected offices and other government agencies and stakeholders.

- *Deliverable 7.1:* Redesigned official logo for the Office of Finance, provided in all necessary high-resolution file formats for print and digital use. At least three (3) logo options will be provided before the final logo is decided upon.
- *Deliverable 7.2:* Comprehensive Brand Style Guide, detailing logo usage, color palettes, typography, imagery guidelines, and departmental communication standards.
- *Deliverable 7.3:* Customizable Google Slides presentation template and other social media assets to align with the new style guide for departmental communications.

3. PROJECT BUDGET

The anticipated budget for this project is two hundred thousand dollars (\$200,000).

Consultants are encouraged to propose optional, additional, or scalable tasks, services, equipment, or technologies not contemplated in this TOS that would improve the deliverables or enhance the project as whole. If proposing optional, additional, or scalable items, Consultant will itemize those costs outside of the required scope. Finance shall consider the optional, additional, or scalable proposed items and its effect on the anticipated project budget.

4. QUALIFICATIONS

This project requires the Consultant to have the following qualifications/skills/knowledge:

- Strategic Planning
- Project Management
- Graphic Design/Visual Communications
- Public Finance, optional/preferred

5. SOLICITATION RESPONSE SCHEDULE & REQUIREMENTS

The following is the **tentative** solicitation schedule:

The City may adjust the schedule as needed. All times reflect Pacific Time.

Issue Task Order Solicitation	July 14, 2026
Question Submittal Period Ends	August 3, 2026 by 4:00 PM Proposers may submit questions regarding this TOS to the TOS-Strategic Plan 2027-2030 Question Submittal Form. All questions and answers will be made available via this opportunity on the RAMPLA website. No individual answers will be given.
Mandatory Pre-Submittal Meeting	July 28, 2026 3:00 PM Google Meet joining info Video call link: Strategic Plan TOS-Mandatory Pre-Proposal Conference Failure to attend the virtual Pre-Submittal Meeting will result in disqualification of your proposal from further consideration. Note: Pre-Submittal Meeting will NOT include a live question and answer session. All questions are to be submitted

	via the Google Form question link provided above.
Business Inclusion Program (BIP) Outreach Deadline	September 2, 2026 12:00AM Potential Proposers that Fail to complete the BIP Outreach requirements by the deadline shall be considered non-responsive, and any subsequent proposal submission will not be reviewed or considered.
Task Order Proposals Due	September 16, 2026 by 3:00 PM
Execute Task Order Agreement (Estimated and Subject to Change)	October 5, 2026

City-optional interviews

Up to the top three (3) Consultants may be invited to participate in an oral interview, either on-site or virtual. Consultants shall receive at least three (3) business days advance notification to prepare for the interview. Upon invitation, proposers shall receive detailed interview/presentation instructions.

6. GENERAL REQUIREMENTS

6.1. SUBCONTRACTING

Consultant will perform the key tasks contemplated and overall project management of the TOS with resources available within its own organization and no portion of the work pertinent to this project will be subcontracted without written authorization by Finance, except that, which is expressly identified in the approved Cost Proposal. All proposers will submit the hourly rates and a clearly-defined scope of work for all sub consultants [If applicable].

The City's Business Inclusion Program (BIP) subcontractor outreach process, the policy that requires respondents to solicitations to perform subcontractor outreach, is required for this TOS. All proposers must perform subcontractor outreach and negotiate in good faith with all available Minority Business Enterprise (MBE), Women Business Enterprise (WBE), Small Business Enterprise (SBE), Emerging Business Enterprise (EBE), Disable Veteran Business Enterprise (DVBE), and Other Business Enterprise (OBE) firms which could perform a portion of the scope of work required in the TOS. As proof of the Consultant outreach efforts, the Consultant is required to perform the BIP Outreach on the City's Regional Alliance Marketplace for Procurement (RAMP) at www.rampla.org and submit TOS Schedule A, Subconsultant Information Form with the proposal. BIP instructions are provided in Attachment C – BIP Outreach Instructions & Forms and additional guidance is available in the [BIP manual](#) available on RAMP.

Proposers must pass all BIP indicators; failure to comply with the City's BIP requirements will render the Task Order Proposal non-responsive and result in its rejection.

6.2. INSURANCE REQUIREMENTS

The awarded Consultant must comply with all of the insurance requirements set forth in the Standard Provisions for City Contracts Exhibit 1 (Form Gen 146) attached hereto and incorporated herein as Attachment B. Required insurance will be fully paid for, and evidence of such payment provided to the City upon City's request, in advance of the signing of the Task Order Agreement. Moreover, insurance certificates must include an Additional Insured Endorsement naming the City an additional insured, completed by Consultant's insurance company or its designee.

Prior to execution of the Task Order Agreement, awarded Consultant will request their Insurance Broker/Agent to complete an Acord 25 Form (Certificate of Liability Insurance) with the required minimum limits and submit to CAO Risk Management via <https://kwikcomply.org>.

6.3. COST PROPOSAL

The compensation for services provided under this TOS will be based on the Lump Sum Method.

Proposers must prepare, and submit with the Proposal, a cost proposal worksheet in the format provided as Attachment D of the On-Call Professional Consultant Services contract (Sample Fee Schedule) attached herein as Attachment D.

The Cost Proposal worksheet must summarize each of the tasks as outlined above with the cost per task. The table will also include the proposed number of staff hours used to estimate the cost of each deliverable [include the costs of proposed sub consultant(s) by task as appropriate]. Proposed project costs will be inclusive of staff salaries, travel costs, and direct expenditures. All travel costs must adhere to City Travel Policies to qualify for reimbursement.

The cost proposal for materials and printing must be presented as a standalone category, and therefore must not be substituted nor commingled with other costs in the table. It must, however, be factored into the total cost of the cost proposal.

6.4. SUBMITTAL REQUIREMENTS

Proposals must be submitted **no later than 3:00 p.m. PST on September 16, 2026**. Proposals submitted after the Proposal Submission Deadline shall be considered late and non-responsive and will not be reviewed or considered. Timely

submission of proposals is the sole responsibility of the Proposer. Proposers are encouraged to submit proposals well in advance of the proposal submission deadline. The City reserves the right to determine the timeliness of all proposal submissions.

All solicitation responses must be submitted as follows:

Finance will **not** accept any hard copy responses, including hand-delivery, USPS, or mail courier. All proposals and documents must be submitted electronically through RAMPLA at [RAMPLA.org](https://snow.lacity.org/rampla), via the TOS opportunity, RAMP ID# 229261.

Any technical assistance questions related to RAMPLA proposal submission must be submitted on <https://snow.lacity.org/rampla>. **Please be advised that due to a current staffing shortage, technical assistance for RAMPLA-related issues may be delayed. Proposers are therefore strongly encouraged to test their login information and submit any questions as soon as possible to ensure a timely response.**

In addition, send an email notification of the technical issue to anita.tang@lacity.org and ricardo.estrada@lacity.org for awareness of the technical issue. Identify the TOS title on the email subject line to ensure prompt attention from the appropriate City staff.

Based on evaluation of the above information the Department may provide the Contractor the opportunity to submit the proposal via an alternate method. **If the above procedures are not followed as stipulated or sufficient evidence provided, the Department may determine the firm as non-response and disqualified from further consideration.**

6.5. ORGANIZATION OF PROPOSALS

Proposals must be in PDF format with Optical Character Recognition (OCR) enabled and submitted as follows:

Part 1: This portion of the response must include documents as described below and must not exceed **forty (40) double-sided pages**, exclusive of cover, dividers, resumes, and other response requirements as described further in this document. The Appendix must be included in this portion of the response but will not count towards the page limit.

Part 2: This portion of the response must be submitted as a separate PDF File and must include the following compliance form: Non-Collusion Affidavit (Attachment A).

All solicitation responses must include the following:

Part 1

- a. Cover Letter: provide a cover letter/statement of interest, signed by an officer of the firm, indicating the firm's interest in the project and highlighting its qualifications to perform this project. A summary of the firm's experience for the project.
- b. Project Team: provide a description of the team and describe the background, roles, and responsibilities of key team members by task, including sub consultants; include any expertise of particular staff who will work together to meet the objectives of the project. (Provide resumes of those who will actually work on the project in the Appendix - see section h below.)
- c. Statement of Qualifications/Related Experience: provide a statement of work that demonstrates a full understanding of the project and provide a description of any previous projects accomplished that is similar in scope to this project.
- d. Project Plan/Approach: provide a description of the project approach to the project, including an outline of the tasks to be performed and products to be produced; provide the approach to Project Management and Quality Control Process.
- e. Detailed Schedule: develop and provide a detailed schedule reflecting all tasks, sub-tasks, and deliverables, and final project plan; the Proposal must include the following:
 - A schedule of milestones and deliverables consistent with this TOS; the submitted project plan should provide a schedule to meet the deadline of Friday, May 28, 2027 for publication and distribution.
 - The schedule must be in a clear format that is easy to follow and trackable for items of completion.
 - The schedule must be in a table with estimated dates of deliverables.
- f. Cost Proposal/Fee Estimate: compensation for services provided in the Proposal will be based on the Lump Sum Method (see section 6.3 Cost Proposal above).

Consultants must submit cost proposals by deliverables, and will include the number of staff hours used to estimate the cost of each deliverable (including costs of proposed sub consultants, if applicable). Cost Proposals shall be submitted on Attachment D.

The cost proposal must include direct costs for materials and printing. Direct expenditures must be a standalone category in the Proposal, and therefore must not be substituted nor commingled with other costs when computing the percentage of completion under the Lump Sum Method of invoicing.

The following response requirements are excluded from the page limit established above.

Appendix: Items to be submitted as concise attachments to the Proposal in Part 1, but will not count towards the page limit.

- g. References & Experience: provide a description of the firm's experience, including a description of similar projects, the implementation processes, and any lessons learned from these experiences; include the contact information with full name, title, e-mail address and phone number.
- h. Resumes: provide resumes of all key personnel who will be assigned to the project.

Part 2

- i. Non-Collusion Affidavit: see Attachment A; must be submitted with the Proposal by Prime Consultant only.

Proposals not containing the information as requested in this section may be deemed incomplete and not considered for award.

Proposals will be evaluated based on the overall best value to Finance based on the criteria set out in this TOS or otherwise reasonably considered relevant. Proposals should present information in a straightforward and concise manner, while ensuring complete and detailed descriptions of the Consultant's abilities to meet the requirements of this TOS.

6.6. SELECTION CRITERIA

Based upon the following criteria, Finance will assign a total point value for each proposal and, if needed, the highest ranked Proposer(s) may be invited to advance to the second round of evaluation.

	Criteria	Weight
1	Understanding of the project tasks and articulation of timeline to deliver all tasks on time.	40
2	Consultant Project Manager's experiences, qualifications, and availability.	40
3	Value offered to the Department considering costs and services.	10
4	Individual project team members' prior experiences leading other projects similar or related in nature to this project.	5
5	References	5

TOTAL		100%
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The City/Department reserves the right to conduct interviews, request oral presentations, and/or seek clarification from Proposer(s) prior to award of Task Order Agreement.

7. MANDATORY PRE-SUBMITTAL MEETING

A pre-submittal meeting will be held for firms interested in submitting a bid in response to this TOS. The meeting will be held on **July 28, 2026 from 3:00-4:00PM (PST)** to discuss requirements of the solicitation response. The meeting will be held virtually.

Finance reserves the right to reschedule the pre-submittal meeting as necessary.

The City will make a presentation. The pre-submittal meeting will **not** have a live question and answer session. All questions must be submitted via [TOS-Strategic Plan 2027-2030 Question Submittal Form](#) prior to the question submission deadline. City responses will be posted on RAMPLA for all potential Proposers to review. City staff will not provide assistance regarding a Proposer's individual bid.

Failure to attend the virtual proposer's conference will result in disqualification of your proposal from further consideration.

8. SOLICITATION ADMINISTRATORS

Angela Berumen, Executive Sponsor
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Anita Tang, Project Manager
anita.tang@lacity.org

Ricardo Estrada, Contract Administrator
ricardo.estrada@lacity.org

9. SOLICITATION QUESTIONS

All questions related to this TOS must be submitted by **4:00 PM (PST) on August 3, 2026** via this [TOS-Strategic Plan 2027-2030 Question Submittal Form](#). Finance may combine and re-phrase similar questions into a single question with an appropriate response to be provided to all parties who were sent this solicitation. All questions and answers will be made available via this opportunity on [RAMPLA.org](#). No individual answers will be provided.

10. DISCLAIMER

The TOS does not commit the Department to proceed with the project, pay any costs incurred in the preparation of a response to this request, or to procure or contract for further services. The Department reserves the right to accept or reject any responses received as a result of this solicitation or to cancel this solicitation in part or in its entirety.

Notwithstanding any provisions in this solicitation, all provisions of the existing On-Call Professional Consultant Services contract are in full force and effect during the performance of the services and are incorporated herein by reference.

11. ATTACHMENTS

Attachment A - Non-Collusion Affidavit

Attachment B - Form Gen 146

Attachment C - Business Inclusion Program Outreach instructions and Forms

Attachment D - Fee Schedule for Percentage of Completion Method