

**Louisiana Land Trust Request for Proposals**  
***“Audit Support and Technical Assistance”***

REQUEST FOR PROPOSALS

READ THIS DOCUMENT CAREFULLY

This solicitation is being conducted under the small procurement procedures established by the Louisiana Land Trust (LLT). The Louisiana Land Trust will award a contract based on the following.

- All Statement of Work (SOW) requirements being met
- The best combination of qualification, experience and cost

Issue Date: 3/10/08

Due Date: 3/12/08

Time Due: **04:30 p.m. Central Time**

**Technical Questions must be received in writing no later than 3/11/08**

- 1. SOLICITATION TYPE**      Best Value Selection  
Fixed Unit Price  
Indefinite Delivery-Indefinite Quantity (IDIQ)

*Submit offers to and request information from the LLT RFP Contact below*

- 2. LLT RFP CONTACT**      **Dr. Nadine Jarmon**  
**Executive Director**  
Louisiana Land Trust  
11601 Southfork Drive, Building D  
Baton Rouge, LA 70816

Email: [njarmon@lalandtrust.org](mailto:njarmon@lalandtrust.org)

**Electronic (PDF) copies of forms, sample contract, and appendices can be found at:**  
**<http://www.lalandtrust.org>**

**3. ORGANIZATION AND BACKGROUND OF THE LOUISIANA LAND TRUST**

3.a. Objectives and Purposes

The LLT is a Corporation organized exclusively for charitable purposes within the meaning of Section 501(c) (3) of the Internal Revenue Code of 1986, as amended and as hereafter amended (the “Code”). The objects and purposes, as defined in Article II of the “Articles of Incorporation,” for which this Corporation is formed is to carry out and effect the purposes and provisions of the Act: namely the acquisition, disposition, purchase, demolition, renovation, improvement, leasing, or expansion of housing stock, including, but not limited to housing stock as described by the Road Home Program designed by the Louisiana Recovery Authority and financed in whole or in part by the U.S. Department of Housing and Urban Development, Community Development Block Grant Program.

#### **4. PROJECT DESCRIPTION**

As specified in the Statement of Work (see APPENDIX A)

#### **5. PROPOSED CONTRACT AWARD AND PERIOD OF PERFORMANCE**

It is the intent of the LLT to award a labor-hour type contract, where the selected vendor will be reimbursed for actual hours worked at the contracted hourly rate(s). The anticipated period of performance is 30 days.

#### **6. COMPETITIVE NEGOTIATED CONTRACT USING BEST VALUE SELECTION**

This solicitation shall be conducted using Best Value Selection that results in an award that is most advantageous to the LLT based on the best value combination of evaluated qualitative merit (based upon experience and expertise) and (b) evaluated price (cost) of the offers submitted.

Best Value Selection is based on the premise that, if all offers are of approximately equal qualitative merit, award will be made to the offeror with the lowest evaluated price (cost). However, the LLT will consider awarding to an offeror with a higher evaluated price (cost) if the offer demonstrates the difference in price (cost) is commensurate with the higher qualitative merit. Conversely, the LLT will consider awarding to an offeror with a lower evaluated qualitative merit if the price (cost) differential between it and other offers warrant doing so.

#### **7. QUALITATIVE MERIT CRITERIA FOR BEST VALUE SELECTION**

The Statement of Work in this Request for Proposals serves as the LLT's baseline requirements that must be met by each offer.

The qualitative merit criteria establish what the LLT considers the technical factors valuable in an offer. These qualitative merit criteria are performance-based and permit selection of a higher priced offer that provides higher qualitative merit.

The following qualitative merit criteria will be used by evaluators to determine the technical value of the offer in meeting the objectives of the solicitation.

Each qualitative merit criteria and its assigned weight are provided below.

##### **7.1 Experience/Past Performance**

- Proposed personnel demonstrate experience and expertise in providing the requested services through education, experience with providing similar services to other organizations and clients.
- Proposal provides substantive information on recent contracts of this size and scope that have been successfully completed.
- Proposal includes resumes of key personnel/technical points of contact proposed to perform on this work effort.

#### **8. PRICE (COST) EVALUATION FOR BEST VALUE SELECTION**

After evaluation of the qualitative merit criteria, the following price (cost) evaluation will be used to determine the best value of the offer in meeting the objectives of the solicitation. The combined qualitative merit value will be considered substantially more important than the price (cost).

#### **9. EVALUATION PROCESS**

The LLT will evaluate offers in two general steps:

Step One—Initial Evaluation An initial evaluation will be performed to determine if all required information has been provided for an acceptable offer. Offerors may be contacted only for clarification purposes during the initial evaluation. Offerors shall be notified if their offer is determined unacceptable and the reasons for rejection will be provided. Unacceptable offers will be excluded from further consideration.

Step Two—Discussion, Selection, Negotiation, and Award All acceptable offers will be evaluated against the Statement of Work and the qualitative merit criteria listed above. Based on this evaluation, the LLT has the option, depending on the specific circumstances of the offers received, to use one of the following methods of selection:

- (a) Make selection(s), conduct negotiations, and make award;
- (b) Conduct parallel negotiations with all offerors and make award;
- (c) Conduct discussions with all offerors, select successful finalists, conduct parallel negotiations with successful finalists, and then make award;
- (d) Conduct discussions with all offerors, conduct parallel negotiations with the finalists, select successful finalist(s), and then make award;
- (e) Select successful finalists, conduct successive negotiations, and make successive selections and award;
- (f) Make no award.

## **10. PROPOSAL PREPARATION INFORMATION**

Proposals may be emailed to the LLT point of Contact with a copy to:

**Kelly Longwell @ KLongwell@coatsrose.com**

Emailed and electronic copies must be in MS Word or PDF compatible format.

- a. The proposal must include a title page, including the RFP title, name of your organization and principal manager (with postal address, telephone and fax numbers, and email address). The title should be succinct and capture the essence of your offer.
- b. A **technical proposal** in an original and three (3) copies directed toward meeting the requirements of the LLT's Statement of Work (see the LLT website) and qualitative merit criteria (see item 6 above). The technical proposal shall be organized by task. The total proposal shall not exceed 10 pages, including title page or resumes.
- c. A completed "**Price/Cost Proposal**" form in an original and three (3) copies submitted with the offer (see the LLT website). The offeror's price/cost and delivery terms must be valid for 90 days from the date of the offer. The price/cost proposal should include support documentation for all categories of the proposed price/cost. The price/cost proposal should separate price/cost for lower-tier subcontract(s) and include support documentation for all categories of the proposed lower-tier subcontract(s) price/cost. (See Price/Cost Proposal preparation instructions (the LLT website). Include contact and report information for any Government agency/audit performed within the past 12 months.
- d. A completed "**Representations and Certifications**" form in an original and two copies (see the LLT website).

## **11. SOLICITATION PROVISIONS**

**a. Late submissions, modifications, and withdrawals of offers**

Offers, or modifications to them, received from qualified organizations after the latest date specified for receipt may be considered if received prior to award, and the LLT determines that there is a potential price (cost), technical, or other advantage, as compared to the other offers received. However, depending on the circumstances surrounding the late submission or modification, the LLT may consider a late offer to be an indication of the offeror's performance capabilities, resulting in downgrading of the offer by the LLT evaluators in the technical evaluation process. Offers may be withdrawn by written notice or telegram (including mailgram) received at any time before award. Offers may be withdrawn in person by an offeror or an authorized representative, if the representative's identity is made known and the representative signs a receipt for the offer before award.

**b. Restrictions on disclosure and use of data**

Offerors who include in their proposals data that they do not want disclosed to the public for any purpose or used by the government or the LLT, except for evaluation purposes shall—

1. Mark the title page with the following legend:

“This offer includes data that shall not be disclosed outside the government or the LLT and shall not be used or disclosed—in whole or in part—for any purpose other than to evaluate this offer. If, however, a subcontract is awarded to this offeror as a result of—or in connection with—the submission of this data, the government or the LLT shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting subcontract. This restriction does not limit the government or the LLT's right to use information contained in this data if obtained from another source without restriction. The data subject to this restriction are contained on pages [insert page and line numbers or other identification of pages] of this offer”; and

2. Mark each page of data it wishes to restrict with the following legend:

“Use or disclosure of data contained on this page is subject to the restriction on the title page of this offer.”

## Appendix A - SOW

The Contractor shall furnish sufficient organization and staff with the necessary skill and judgment to provide comprehensive audit management and response support services necessary to assist the Louisiana Land Trust in the execution of preparing response to anticipated audits and drafting response to present and pending finding.

Technical Assistance shall include but not be limited to:

1. Review and revise as necessary, existing audit procedures, provide written recommendations identifying specific areas contained therein requiring updates and/or revisions.
2. Review existing audit and monitoring correspondence by and between the LLT and its monitoring and oversight agents.
3. Assist in the preparation of responses to anticipated audits by monitoring and oversight agents.
4. Assist in the preparation of response to current findings provided by monitoring and oversight agents.
5. Attend meetings, offer suggestions/guidance relating to audit and monitoring issues as requested.