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PERALTA COMMUNITY COLLEGE DISTRICT

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REQUEST FOR PROPOSALS  
FINANCIAL ADVISORY SERVICES

**RFP # 25-26/05**

**Due Date: January 8, 2026**

## I. INTRODUCTION

NOTICE IS HEREBY GIVEN that the Board of Trustees of the Peralta Community College District (“District”), through the Department of Purchasing, is hereby requesting proposals (“Proposals”) from qualified financial advisory firms who are experienced in providing California educational entities with financial advisory services related to the issuance of general obligation bonds, parcel tax, leases, certificates of participation, refunds, and other municipal financing options (“Services”). The objective of the District is to select a qualified financial advisor with diverse and substantial experience related to bond financing.

**All Request for Proposals (“RFP”) must be submitted electronically to Planet Bids via the following link:**

**<https://vendors.planetbids.com/portal/71895/portal-home>**

Each Respondent is solely responsible for timely submission of its proposal; the District is not responsible for any technological issues in a Respondent’s ability to timely submit its proposal or portion thereof by the specified date and time as prescribed in this RFP.

**ALL RESPONSES ARE DUE BY 3:00 P.M. ON JANUARY 8, 2026.**

No paper copies, emails, facsimiles, or verbal submissions will be accepted. Proposals received after this date and time will not be accepted. Each Respondent is solely responsible for the timely submission of its Proposal. The District is not responsible for any technical issues in a Respondent’s ability to submit a Proposal or any portion thereof by the specified date and time as prescribed in this RFP.

All Proposals shall be formally submitted through the [PlanetBids](#) portal.

A non-mandatory pre-proposal Zoom meeting for these Services will be held at 11:30 A.M. **on December 2, 2025.**

**Meeting Link:** <https://peralta-edu.zoom.us/j/82289716759>

Respondents are strongly encouraged to attend to fully understand the scope of Services and requirements.

Questions regarding the RFP may be directed in writing via Planet Bids at: <https://vendors.planetbids.com/portal/71895/portal-home> and must be submitted in writing on or by 3:00 P.M. on **December 15, 2025.** For any other concerns contact the Buyer, Seraphine Nzomo, [snzomo@peralta.edu](mailto:snzomo@peralta.edu)

Each Proposal must conform and be responsive to the requirements set forth in the RFP. District reserves the right to waive any informalities or irregularities in received Proposals. Further, District reserves the right to reject any and all Proposals and to negotiate contract terms with one or more Respondents for any portion of the Services. District retains sole discretion to determine issues of compliance and to determine whether any Respondent is responsive, responsible, and qualified.

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### **III. RFP SCHEDULE**

The District reserves the right to change the dates on the schedule without prior notice.

| <b>DATE/TIME</b>                       | <b>EVENT</b>  |
|--|---|
| <b>November 19, 2025</b>               | <b>Release of RFP/ RFP Published</b>  |
| <b>December 2, 2025, 11:30 A.M.</b>    | <b>Non-Mandatory RFP Pre-Proposal Zoom Meeting</b><br><b>Meeting Link:</b><br><a href="https://peralta-edu.zoom.us/j/82289716759">https://peralta-edu.zoom.us/j/82289716759</a> |
| <b>December 15, 2025, 3:00 P.M.</b>    | <b>Last day to receive written questions from Respondents (RFI). Please submit questions as soon as possible.</b>   |
| <b>December 19, 2025, 3:00 P.M.</b>    | <b>Last day for District to issue addenda to answer questions/ provide clarifications.</b>  |
| <b>January 8, 2026, 3:00 P.M.</b>      | <b>RFP response Due Date.</b>   |
| <b>Week of January 12, 2026 or TBD</b> | <b>Evaluation Period</b>  |
| <b>Week of January 20, 2026 or TBD</b> | <b>Notice to selected Respondent(s)</b>   |
| <b>Week of January 26, 2026 or TBD</b> | <b>Interviews, if any, of Respondents</b>   |
| <b>February 9, 2026</b>                | <b>Board Approval Date</b>  |

### **IV. BACKGROUND**

The District was established in 1964 and encompasses a geographical area of 78 square miles within Alameda County, which includes the municipalities of Alameda Albany, Berkeley, Emeryville, Oakland, and Piedmont in the State of California. The District operates four colleges, providing students with a variety of educational programs and services, including associate degrees, certificates, and university transfer programs: Laney College in downtown Oakland; College of Alameda in Alameda; Merritt College in the Oakland Hills, and Berkeley City College in downtown Berkeley. Additionally, the District owns and manages an Aviation Maintenance Facility at Oakland International Airport and a Science Center at the Alameda Business Center. All four colleges are fully accredited by the Accrediting Commission for Community and Junior Colleges ("ACCJC") of the Western Association of Schools and Colleges.

County voters in the Election of 2018 approved Measure G, which authorizes the District's Board of Trustees to issue \$800 million in principal amount of general obligation bonds for the purpose of capital improvements within the District. To date, the District has issued three series of bonds pursuant to Measure G: its 2020 General Obligation Bonds, 2018 Election, Series A in the principal amount of \$50 million, its 2022 General Obligation Bonds, 2018 Election, Series B in the principal

amount of \$120 million and its 2025 General Obligation Bonds, 2018 Election, Series C in the principal amount of \$150 million.

The District is seeking qualified persons, firms, partnerships, corporations, associations, or professional organizations to support to provide the desired financial advisory services. The objective of the District is to select a qualified financial advisor with diverse and substantial experience related to bond financing.

This RFP explains the Services sought and generally outlines the requirements for the District's award of a contract. The District anticipates entering into an Independent Consultant Agreement for Special Services ("Agreement") with the selected Respondent(s) which establishes the terms and conditions of the parties' agreement.

## **VI. SCOPE OF SERVICES**

The selected Respondent must be prepared and equipped to provide the following Services in a timely manner and on relatively short notice so as to enable the District to meet critical, and at times, unpredictable, time deadlines and schedules. In particular, Respondents wishing to be considered for selection by the Board of Trustees must agree to meet the District's requirements and provide any/all services listed below at the specific request of the District, including, but not limited to, the following:

1. Provide the District with expert independent financial advice and assistance on financing techniques and options on matters pertaining to the issuance and sale of securities including general obligation bonds, Parcel Taxes, certificates of participation, refunds and other municipal financing options available to California Community Colleges.
2. Provide the District with available financing options by conducting studies and analyses to determine the most appropriate and cost-effective financing methods, terms, security provisions, and repayment structures. Financing options and accompanying studies and analyses shall be presented to the District within an agreed upon timeline.
3. Provide bond financing schedules and sizing analyses to the District.
4. Prepare bond amortization schedules at the level necessary to calculate future debt service payments and satisfy accounting, budgetary and borrowing requirements.
5. Work cooperatively with and coordinate the work of bond counsel and/or underwriter to be selected by the District, in connection with the issuance of bonds.
6. Assist disclosure counsel with the preparation of preliminary and final official statements to provide the market with timely and accurate information about the District and its bond issues.

7. Provide oversight and guidance during the pricing period including review and comment on indicative and proposed scales, proposed call features, underwriting spreads, and other pricing-related matters.
8. Monitor and control fees and expenses incurred in connection with the issuance of bonds.
9. Assist District officials in preparing materials for presentation to national credit rating services regarding the District's financial condition and debt structures.
10. Advise the District concerning the need for credit enhancement and assist in the procurement and negotiation of related agreements.
11. Have representatives present at the Board of Trustee and other District meetings, when requested or notified, on matters concerning financing techniques and bond issues.
12. Prepare other analyses that may be utilized by the District for its financings.
13. Continuously evaluate the investment's plan relevance to current or developing market conditions.
14. Develop a schedule for all participating parties with regard to any of the above transactions.
15. Assist in closing details and post-closing duties. Maintain debt services records on all outstanding District debt.
16. Provide assistance in the development of voted bond programs, including working with citizen committees.
17. Assist the District in long-range financial planning as needed.
18. Assist in evaluating outside vendors providing: arbitrage rebate, investment advisory, verification reporting, and other ancillary services.
19. Perform such other functions normally contemplated to be within the scope of a fully qualified financial advisor.

" This RFP and scope of work does not apply to Other Post Employment Benefit (OPEB) funds, financing, or underwriting. These bonds and finances will be maintained and managed by Backstrom, McCarley and Berry"

## VIII. LIMITATIONS

This RFP is neither a formal request for bids, nor an offer by District to contract with any party

responding to this RFP. All decisions regarding selection will be made in the District's best interests. The contract(s) award pursuant to this RFP, if at all, is at the District's sole discretion.

The District makes no representation that participation in the RFP process will lead to a contract award or any consideration whatsoever. The District shall in no event be responsible for the cost of preparing any Proposal in response to this RFP.

Proposals and any other supporting materials submitted to the District in response to this RFP will not be returned and will become the property of the District unless portions of the materials are designated as proprietary at the time of submittal and are specifically requested to be returned. Vague designations and/or blanket statements regarding entire pages or documents are insufficient and will not bind the District to protect the designated matter from disclosure.

Pursuant to *Michaelis, Montanari, & Johnson v. Superior Court* (2006) 38 Cal.4th 1065, Proposals shall be held confidential by the District and shall not be subject to disclosure under the California Public Records Act until after either: (1) District and the successful Respondent(s) have completed negotiations and entered into an Agreement, or (2) District has rejected all Proposals. Furthermore, the District will have no liability to Respondent or other party as a result of any public disclosure of any Proposal.

#### **X. FULL OPPORTUNITY**

District hereby affirmatively ensures that all Respondents including, without limitation, Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprise ("SLBE"), Small Emerging Local Business Enterprise ("SELBE") and Disabled Veterans Business Enterprise ("DVBE") firms, shall be afforded full opportunity to submit qualifications in response to this RFP and will not be discriminated against on the basis of actual or perceived race, color, national origin, ancestry, age, religious creed, marital status, pregnancy, physical or mental disability, medical condition, genetic information, military and veteran status, sex, sexual orientation, gender, gender identity, gender expression, immigration status, or association with a person or group with one or more of these actual or perceived characteristics in any consideration leading to the award of contract.

#### **XI. RESTRICTIONS ON LOBBYING AND CONTACTS**

From the period beginning on the date of the issuance of this RFP and ending on the date of the award of a contract, no person, or entity submitting in response to this RFP, nor any officer, employee, representative, agent, or consultant representing such a person or entity shall contact through any means or engage in any discussion regarding this RFP, the evaluation or selection process/or the award of the contract with any member of District, Governing Board, selection members, or any member of the Citizens' Oversight Committee. Any such contact shall be grounds for the disqualification of Respondent.

## **XII. PROPOSAL REQUIREMENTS**

The District has scheduled a pre-proposal Zoom meeting on December 2, 2025 at 11:30 A.M. via this Zoom Meeting Link: <https://peralta-edu.zoom.us/j/82289716759> as indicated in the cover page of this RFP. The conference, while not mandatory, is highly recommended. General program information will be provided as well as information specific to this solicitation.

Please respond to the following submission requirements in a straightforward manner, with a concise delineation of your capabilities proposed to satisfy the requirement of the RFP. The District will use your responses to objectively determine your capabilities and experience. Respondent's Proposal must include the following sections:

### **A. Submittal Format**

Responses may not be longer than a maximum of 36 pages (one sided or 18 pages double sided, excluding the required attachment forms provided with this RFP), printed on 8 ½" x 11" paper and formatted in no smaller than 11-point font. Each section shall be labeled according to the sections below.

### **B. Content**

#### **1. Cover Letter**

Provide a letter of introduction signed by an authorized officer of Respondent. If Respondent is a joint venture, duplicate the signature block and have a principal or officer also sign on behalf of each party to the joint venture.

Include in the cover letter all of the following:

- Brief description of why Respondent is well suited for, and can meet, District's needs.
- Identification of individual(s) who are authorized to speak for Respondent during the evaluation process.
- One (1) of the following statements:

*"[INSERT RESPONDENT'S NAME] received a copy of District's form of Independent Consultant Agreement for Special Services ("Agreement") attached as Appendix A to the RFP. [INSERT RESPONDENT'S NAME] has reviewed the Agreement, including, without limitation, the indemnity provisions and insurance provisions. If given the opportunity to contract with District, [INSERT RESPONDENT'S NAME] has no objections to the use of the Agreement."*

OR

*"[INSERT RESPONDENT'S NAME] received a copy of District's form of Independent Consultant Agreement for Special Services ("Agreement") attached*



*as Appendix A to the RFP. [INSERT RESPONDENT'S NAME] has reviewed the Agreement, including, without limitation, the indemnity provisions and insurance provisions. If given the opportunity to contract with District, [INSERT RESPONDENT'S NAME] has objections to the use of the Agreement, all of which are identified in the Appendix to this Submittal."*

- Certification that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the District.
- Certification that no official or employee of Respondent has ever been convicted of an ethics violation.
- Evidence that Respondent is legally permitted to conduct business in the State of California and properly licensed (as applicable) for the scope of Services.
- Above the signature(s) the following language: *"By virtue of submission, [INSERT RESPONDENT'S NAME] declares that all information provided in the Submittal is true and correct."*

## **2. Company Information/Executive Summary**

- Company name.
- Address.
- Telephone.
- Fax.
- Website.
- Name and email of main contact.
- Federal Tax I.D. Number.
- License or Registration Number (if applicable).
- Brief company history with attention to relevant experience and capabilities needed to successfully execute the scope of Services.
- Location of office where the bulk of Services solicited will be performed.
- State of California certification of Small Business or Disabled Veteran Business Enterprise status, if any.

## **3. Qualifications**

- Briefly summarize the qualifications and experience of your company's professionals in municipal finance in general, and California education finance specifically.
- Supply the names of the individuals who will be working with the District and the roles and locations of each individual. Please provide brief resumes of these individuals.
- Describe what distinguishes your company from other financial advisory firms and how your services will benefit the District financially.

#### **4. Experience and Recent Transactions**

- Please include a list of California entities and contact information for which your company acted as a financial advisor in the past five years.
- Please include the date, par amount, issuer, type of bond, new money or refunding, and lead financial advisor for California public educational institutions for which your company acted as a financial advisor in the past five (5) years.
- Please select four (4) recent short-term and long-term, fixed-rate and /or adjustable-rate competitive sale or negotiated transactions since 2018 in which your firm's professionals were involved.
- List the following information regarding each transaction: Sale date, issuance size, maturity amounts, scale and optional call features, underwriting spread, credit rating, credit enhancement (if any), and any other relevant information.

#### **5. References**

- Include a list of California entities and contact information for which your company acted as a financial advisor in the past five (5) years.

#### **6. Fee Proposal**

- Provide your firm's fees for the issuance of General Obligation Bonds, Certificates of Participation, Tax and Revenue Anticipation Notes, Refunding Issuances, and Bond Anticipation Notes.
- Further, identify consultant fees, if any, for services the District might require for municipal financing not directly related to the issuance of a bond/note.
- If there are to be charges for reimbursable expenses, please list all charges to be considered reimbursable and provide a not-to-exceed amount for said expenses.

#### **7. Other Services**

- Does your firm provide calculations to satisfy federal arbitrage rebate compliance? If so, please indicate the amount charged for each calculation along

with what is included in the scope of services and deliverables.

- Does your firm provide services to satisfy continuing disclosure compliance? If so, please indicate the amount charged along with what is included in the scope of services and deliverables.

## **8. Required Forms**

- The Respondent must fill out all forms included in the RFP which are distributed with this RFP as **Appendix B** and incorporated herein by this reference and return them with your Proposal.
- Failure of the Respondent to provide any information requested in the RFP may result in rejection for non-responsiveness. (These required forms will not count against the maximum page count for your response.)

## **9. Debarment**

- Provide a statement that your company has not been debarred from providing services to any State or Federal Agency within the last five (5) years. Sign and date your statement.
- If your firm has been debarred, you will need to provide background information and reason for the debarment. Provide the name and contact information for the Agency that debarred your firm. The District must review the reason and duration for the debarment before it can determine if your firm can be considered for this Project.

## **10. Environmentally Sustainable Procurement:**

- It is the policy of the District (Board Policy 2.40, Environmental Sustainability), to purchase products or services that help to minimize the adverse effects on human health and the environment, when compared to other products and services that serve the same purpose with comparable efficacy. Does your product or service promote the District's Environmentally Sustainable Procurement goal? Please use the attached Environmentally Sustainable Procurement form to describe how your product or service directly meets the District's goals.
- If your product or service does not directly meet the District's goal, then describe what initiatives your firm has taken to become more environmentally sustainable. The District will evaluate each response, and more points will be awarded to firms whose products and services directly meet the District's Environmentally Sustainable Procurement goal.

## **11. Litigation History**

- Provide a comprehensive five (5)-year summary of Respondent's litigation history (including arbitration and mediation) with previous clients. State the issues in the

litigation, the status of the litigation, names of parties, and outcome. A Proposal failing to provide the requested information on litigation history will be considered non-responsive.

### **XIII. EVALUATION CRITERIA AND SELECTION PROCESS**

#### **A. Evaluation Criteria**

Each Proposal must be complete. Incomplete Proposals will be considered nonresponsive and grounds for disqualification. District retains sole discretion to determine issues of compliance and to determine whether a Respondent is responsive, responsible, and qualified. District may elect to conduct interviews with some or all of the Respondents. The criteria for evaluating Respondents may include, without limitation, the following:

- **Response completeness and clarity.**
- **Experience with K-12 and/or California Community College Districts.**
- **Demonstrated understanding and responsiveness to the District's RFP.**
- **Qualifications and experience of firm and personnel named in the Proposal.**
- **Competence and experience of assigned staff in structuring and completing K-12 and/or California Community College financings.**
- **Past experience in assisting California Community College Districts with financial information necessary for the successful issuance of bonds, certificates of participation, tax and revenue anticipation notes, refundings, etc.**
- **Proposed fees.**
- **Quality and strength of references.**

The District must be assured that the Respondent selected has all the resources required to successfully perform under the contract. This includes, but is not limited to, personnel with skills required, equipment/materials and financial resources sufficient to provide services called for

under this contract. If during the evaluation process, the District is unable to assure itself of the Respondent's ability to perform under the contract, if awarded, the District has the option of requesting from the Respondent, any information that the District deems necessary to determine the Respondent's capabilities. If such information is required, the Respondent will be notified and will be permitted five (5) working days to submit the requested information.

In evaluating your Proposals, the District will evaluate several factors in combination. Please make sure you have submitted responses to all items listed in the Submission Requirements section. The District will identify Respondent(s) that can provide the greatest overall benefit to the District.

| Item | Criteria          | Points |
|------|-------------------|--------|
| 1    | Experience        | 25     |
| 2    | Qualifications    | 25     |
| 3    | Range of Services | 15     |
| 4    | Client References | 15     |
| 5    | Fees              | 20     |
|      | TOTAL             | 100    |

#### **B. District Investigations**

District may perform investigations of Respondents that extend beyond contacting the references identified in the Submittal. District may request a Respondent submit additional information pertinent to the review process.

#### **C. Interviews**

District, at its sole discretion, may elect to interview one or more Respondents. If a Respondent is requested to come for an interview, the key proposed staff will be expected to attend the interview. **Any proposed changes to the form of Agreement attached hereto as Appendix A shall be provided with the Submittal and may be the subject of inquiry at the interview.**

#### **D. Selection Procedure**

A technical screening committee comprised of District internal (and possibly external) members with expertise in the District operations will initially evaluate and score all submissions according to the evaluation criteria above. Based on these evaluations and reviews, the District's selection committee will choose the most highly qualified firm to be selected.

#### **E. Final Determination and Award**

The District reserves the right to contract with any entity responding to this RFP for all or any portion of the services described herein, to reject any Submittal as non-responsive, and/or not to contract with any Respondent for the services described herein. The District makes no representation that participation in the RFP process will lead to an award of contract or any consideration whatsoever. The District reserves the right to contract with any person or firm not participating in this process. The District shall in no event be responsible for the cost of preparing any Submittal in response to this RFP, including any supporting materials.

Awarding of contract(s) is at sole discretion of the District. The District may, at its option, determine to award contract(s) only for portions of the scope of services identified herein. In such case, the successful Respondent(s) will be given the option not to agree to enter into the contract and the District will retain the right to negotiate with any other Respondent selected as a finalist. If no finalist is willing to enter into a contract for the reduced scope of work, the District will retain the right to enter into negotiations with any other Respondent to this RFP.

#### **XIV. ADDITIONAL REQUIREMENTS**

##### **1. Law Compliance**

The Respondent must comply with all laws, ordinances, regulations, and codes of the Federal, state, and local governments which may in any way affect the preparation of Proposal or the performance of the contract.

##### **2. Public Records**

Except for materials exempted from disclosure such as Trade Secrets (as defined in California Civil Code 3426.1) that are specifically marked "Confidential" or "Proprietary", all material submitted in response to this RFP are deemed property of the District and public records upon submission to the District. The District is not liable or responsible for the disclosure of RFP Responses, or portion thereof, deemed to be public records, including those exempt from disclosure if disclosure is by law, by an Court Order, or which occurs through inadvertence, mistake or negligence on the part of the District or its agents or representatives. If the District is required to defend or otherwise respond to any action or proceeding wherein request is made for the disclosure of the contents of any portion of a RFP Response deemed exempt from disclosure hereunder, by submitting a response to the RFP, each Respondent agrees to defend, indemnify and hold harmless the District in any action or proceeding from and against any liability, including, without limitation, attorneys' fees arising therefrom. The party submitting materials sought by any other party shall be solely responsible for the cost and defense in any action or proceeding seeking to compel disclosure of such materials.

##### **3. Qualification Considerations**

The District has absolute discretion with regard to acceptance and rejection of Proposals. To

be considered, the party submitting a Proposal waives the right to bring legal proceedings challenging the Board's choice of the award.

#### **4. False Statements**

False statements in a Proposal will disqualify the Proposal.

#### **5. Legal Proceeding Waiver**

The Respondent's relationship to District shall be that of independent contractor and not deemed to be agent of the District.

#### **6. Taxes**

The Respondent will be responsible for all Federal, State and Local taxes.

#### **7. Grade of Service**

The Respondent must provide professional service and maintain appropriate personnel to provide expedient and courteous service.

#### **8. Amendments**

The District may, at its sole discretion, issue amendments to this RFP at any time before the time set for receipt of Proposal. Respondents are required to acknowledge receipt of any amendments (addenda) issued to this RFP by acknowledging the Addendum in the space provided on the RFP Acknowledgement and Signature Form. The District shall not be bound by any representations, whether oral or written, made at a pre-submittal, pre-contract, or site meeting, unless such representations are incorporated in writing as an amendment to the RFP or as part of the final contract. All questions or request for clarification concerning material terms of the contract should be submitted in writing for consideration as an amendment.

#### **9. Withdrawal or Modification of Offers**

Respondents may modify or withdraw a Proposal in writing at any time before the deadline for submission of a Proposal.

#### **10. Representations**

No representations or guarantees of any kind, either made orally, or expressed or implied, are made with regard to the matters contained in this document, including any attachments, letters of transmittal, or any other related documents. Respondents must rely solely on its own independent assessment as the basis for the submission of any Proposal.

**WE THANK YOU FOR YOUR INTEREST**

**APPENDIX A**  
**Agreement**



## **APPENDIX B**

### **Required Forms**

1. Iran Contracting Act Certification
2. Certificate Regarding Workers' Compensation
3. Statement of Equal Employment Opportunity
4. Small Local Business Enterprise and Small Emerging Local Business Enterprise Program
5. SLBE/SELBE Self Certification Affidavit
6. Non-Collusion Affidavit
7. RFP Acknowledgement and Signature Form
8. Insurance Documents