



REQUEST FOR PROPOSAL

Facilitator and Trainer for Diversity, Equity, Inclusion and Planning

Issued by:

Philadelphia Housing Development Corporation ("PHDC")

On behalf of the City of Philadelphia, Department of Planning and Development ("DPD") and PHDC

Questions about this RFP should be submitted to catherine.califano@phila.gov by 12/18/2019.

Responses to this RFP must be emailed as a single .pdf by 5:00 pm on January 9, 2020 to catherine.califano@phila.gov.

A. Scope of Services

The City of Philadelphia's ("City") Department of Planning and Development ("DPD") and the Philadelphia Housing Development Corporation ("PHDC") are pleased to issue this Request for Proposals ("RFP") seeking a qualified consultant (each, an "Applicant", and together, the "Applicants") to provide professional services to support our ongoing Diversity, Equity and Inclusion ("DEI") work. DPD and PHDC have a vision to serve as model agencies in building diverse, equitable and inclusive work environments and performing our work through DEI lens. We seek to demonstrate our commitment to our staff, our colleagues in other City agencies and in our work with the public. DPD and PHDC staff work closely together although they are two (2) separate entities with different work rules, leadership and processes. Where possible, we seek to align our working environments and define a shared commitment to DEI both internally and externally.

The selected Applicant will guide the leadership teams and staff through a three (3) stage process to:

1. Assess current status of DEI within the agencies;
2. Develop a strategic DEI framework whose adoption allows for implementation of our vision. This includes addressing internal processes, policies and crafting a training curriculum; and
3. Utilize the framework and curriculum to deliver training to all staff in small group settings.

Stage I: Discovery and Assessment Process

During the discovery phase, DPD/PHDC will provide:

- information on the trainings completed to date,
- demographic data on current employees within each unit and how it compares to the City's population,
- meeting notes and activities of the respective agency's Diversity and Inclusion Committee;
- and other materials to provide an understanding of the work to date.

The selected Applicant will assess the current state of DEI within the agencies to create a baseline and assist the leadership teams of each entity to define a vision for success and develop a strategy to get there. The selected Applicant will look for alignment and synergy between the agencies.

In this phase, the selected Applicant will also assist DPD and PHDC to establish a communication plan and platform for collecting and sharing information during the process. Communicating and engaging employees within all functional areas and at all levels of the agencies is critical to ensuring ownership and connection to the agencies' vision during this process. The rich diversity

of the agencies means that our staff may view the impact and importance of policies, procedures, events and communications practices differently. Establishing a plan and roadmap that provides insight along the way is critical to support transparency, understanding and engagement in the process. The selected Applicant may use various mediums to seek employee input in the process. The methods should be elaborated on in the proposal.

At the end of Stage I, the selected Applicant will provide the collective leadership teams at DPD/PHDC with a report and presentation of their findings and recommendations.

Stage II: Developing the Strategy and Training Plan

Both DPD and PHDC have some existing policies and work rules that are established either through the City or various labor contracts. There are additional policies, procedures and practices where the agencies have some autonomy to set policy. We seek to evaluate these through a DEI lens, and align these practices within DPD and PHDC where possible.

Proposed strategies to incorporate a DEI lens within the agencies should align to the issues and priorities identified and adopted after Stage I. Included should be practices regarding language, communication methods, incentives and peer to peer conflict resolution tactics; particularly as the agencies seek support for the management of microaggressions regarding race, gender, age, sexual orientation and identity, education, and family status within the workplace and through community engagement practices.

At the end of Stage II, the selected Applicant shall produce a report and presentation of findings on how to support the implementation of the DEI strategy as well as recommended trainings and policy changes necessary for staff all levels of the agencies to ensure collective understanding and ownership of the vision.

Stage III: Training and Technical Support

At this stage the selected Applicant will organize, provide training curriculum and facilitate the needed training sessions identified in the Step II strategy. These trainings may take place in small group settings or other methods as may deemed most effective. Some recommendations may require technical support in addition to trainings. The services identified in Stage II will be produced and provided in Stage III.

B. Organizational Background:

The Kenney Administration is committed to an inclusive growth agenda that ensures that the City is a dynamic and diverse city that attracts, retains, and grows employers who offer career pathways and economic opportunities to all residents. DPD is a key component in this strategy. <https://www.phila.gov/media/20190502112652/Growing-With-Equity.pdf>

DPD and PHDC are seeking to build an inclusive, equitable and diverse work environment for our approximately 215 employees and ensure our work and services are produced and delivered in a way to reflect these goals. DPD works with communities to promote, plan, preserve, and develop successful neighborhoods for all. It includes the Division of Housing and Community Development, Division of Planning and Zoning, Division of Development Services and Executive Administrative Services.

In July 2017, the DPD was established and consolidated the Philadelphia City Planning Commission, Philadelphia Historical Commission, Zoning Board of Adjustments and the Philadelphia Art Commission into the Division of Planning and Zoning. Additionally, the Office of Housing and Community Development transitioned from an exempt office under the Mayor's Office to the Division of Housing and Community Development. Lastly, the Division of Development Services transitioned from a function within the Commerce Department to DPD.

PHDC is a full-service community development entity; it works to build stronger communities, prevent homelessness, create affordable housing. PHDC's staff support the Philadelphia Land Bank and the Philadelphia Redevelopment Authority boards and functions.

In July 2019, PHDC merged with the Philadelphia Redevelopment Authority. All land management functions, community investment functions and housing improvement programs now operate under one leadership team and seeking to streamline and integrate programs and practices within the organization and expand to launch new services and programs to meet the changing housing needs and community investment strategies necessary to propel the City forward.

In 2018, the DPD and PHDC established a Diversity and Inclusion Committee after a department wide retreat that included workshops on bias and barriers faced by people due to their race, religion, ethnicity, sexual orientation and identity or family status. The committee meets monthly and has embraced strategies to increase youth exposure to careers in planning and development. The Committee is also in the process of organizing informal discussions between staff and leaders who work to advance the needs and interests of traditionally under-represented and discriminated groups in order to build an understanding of the needs and challenges these groups face accessing public services.

C. Applicant Competencies and Skills:

- *Professional Experience* - Expertise in organizational dynamics and working to build inclusive organizations; specific experience working with governmental organizations and with clients who work in a regulated work environment is highly valued
- *Organizational Agility* - Knowledgeable about how to organize, synthesize and manage groups and align multiple competing demands
- *Project Management* – Ability to accurately scope length and difficulty of tasks and projects; facilitate creation of objectives and goals; measure performance against goals; and evaluate results and adapt to ensure success
- *Communication* - Clear and effective communicator with strong writing and verbal skills, able to make information accessible, digestible, and actionable to staff
- *Diversity, Inclusion and Equity Expertise*- Demonstrated experience facilitating and training staff in various positions on how to increase staff appreciation for diverse populations needs and views.

D. Contract Terms

Budget

This is a fixed price contract not to exceed One Hundred Ten Thousand Dollars (\$110,000) for service delivery to both agencies inclusive of time, travel and expenses. The selected Applicant may bill no more frequently than monthly and should bill by percent complete of each task. Proposals should outline specific tasks and milestones and their associated cost. Payment for completion of milestones will be contingent on the product being accepted by DPD.

Proposal Timeline

- Proposals received January 9, 2020 by 5 pm
- Interviews week of January 13th - 17th 2020 (at a mutually agreed upon time)
- Final Selection January 24, 2020
- Contract Start February 2020
- Project Timeline: Goal to complete all three stages within one (1) year from contract start date.

Project Deliverables

Each Applicant's proposal should include a budget and payment schedule that relates to the deliverables in the scope.

- Stage I: Discovery
 - Plan for engagement and soliciting staff participation into the process
 - Check- In Meetings with Leadership Team

- Written report, provided first in draft form for DPD/PHDC accompanied by a presentation of findings and recommendations
- Stage II: Developing the Strategic Framework and Curriculum for Training
 - Produce work plan for how to implement and measure movement towards goals
 - Recommended adjustments to existing policies or recommended new policies and procedures
 - Prepare training curriculum to align with strategy
 - Determine the schedule, format, delivery mechanism and defined outcomes for each session
- Stage III: Delivery of training sessions for approximately 215 staff members. This RFP assumes that the scope will include some trainings for all staff to participate in regardless of their role or position in the organization.

E. Submission Requirements

1. Organization & Personnel Qualifications: The proposal must identify the Applicant's qualifications by education level, skill set (described in detail), experience level, and job title. Resumes of all personnel so identified should be included in Applicant's proposal. Experience with "like" projects should be cited.

2. Scope of Work Description: The scope of work proposed by Applicant should include a general project schedule that identifies estimated time for all tasks, activities, deliverables, and milestones. The proposal should state the number of days following PHDC's authorization to proceed by which it will be ready to start the work, including any mobilization time.

3. Cost Proposal: Applicant must provide a detailed cost proposal, which must include 1) a line-item breakdown of the costs for specific services and work products proposed, and 2) a statement of staff hourly rates. The proposed price must include all costs that will be charged to PHDC for the services and tangible work products the Applicant proposes to perform and deliver to complete the project. Any contract resulting from this RFP will provide for a not-to-exceed amount in the compensation section of the contract.

4. References: Include contact information for a minimum of two (2) references who can speak to the Applicant's experience with similar types of work as that described in this RFP.

5. MBE/WBE/DBE: DPD seeks to promote opportunities for disadvantaged business. For all contracting efforts, each prime shall use its good faith and nondiscriminatory efforts to provide

joint venture partnerships, sub-consulting and subcontracting opportunities for minority, women, disabled, and/or disadvantaged business enterprises (collectively, M/W/DS-BE and/or DBE) registered in the City of Philadelphia's Office of Economic Opportunity ("OEO") and/or any agency that the City recognizes as having bona fide certifying program. The Department's OEO goal is 35% for all contracting activities.

6. Deadline for Submission: Proposals submitted in response to this RFP must be emailed as a single .pdf by **5:00 pm January 9, 2020**, to catherine.califano@phila.gov, if proposals are too large for submission by email, Applicants can provide an alternative means but this must be requested and tested prior to submission date.

7. Proposal Review and Selection Process: It is expected that proposals will be reviewed, and a limited number of interviews will be held during the week of January 13th - 17th, 2020. The successful Applicant will be chosen based on a demonstration of knowledge, experience, ability and capacity to perform the work effectively. The term of the contract between PHDC and the winning Applicant will be one (1) year, which may be extended at the sole discretion of PHDC.

F. Declarations and Other Information

Tax Clearance and Conflict of Interest Form: Applicants, upon request of the PHDC, must provide evidence satisfactory to PHDC that all municipal taxes, including business taxes, real estate, school, water and sewer charges, if applicable, are current for both the individual Applicant and the Applicant's firm and neither is currently indebted to the City; will at any time during the term of the agreement be indebted to the City, for or on account of any delinquent taxes, liens, judgments, fees or other debts for which no written agreement or payment plan satisfactory to the City has been established. Please complete the Philadelphia Tax Status Certification and Conflict of Interest form (**Attachment A**) and submit it with your proposal.

Campaign Contribution Disclosure Forms: Please complete the applicable disclosure forms (**Attachment B**) and submit with your proposal.

Insurance Requirements: Please submit a certificate of insurance evidencing the required coverages as outlined in **Attachment C** with your proposal. If, for any reason, you cannot comply with the insurance requirements, please provide the reasons for your inability to do so in your proposal and PHDC will consider any deviations from the insurance requirements on a case-by-case basis.

By submitting a proposal in response to this RFP, an Applicant affirmatively acknowledges: (i) its acceptance of the terms and conditions of this RFP; (ii) PHDC may exercise in its sole discretion

the following rights; and (iii) PHDC may exercise the following rights at any time and without notice to any Applicant:

1. to reject any and all proposals;
2. to supplement, amend, substitute, modify or re-issue the RFP with terms and conditions materially different from those set forth here;
3. to cancel this RFP with or without issuing another RFP;
4. to extend the time period for responding to this RFP;
5. to solicit new proposals;
6. to conduct personal interviews with any Applicant to assess compliance with the selection criteria;
7. to request additional material, clarification, confirmation or modification of any information in any and all proposals;
8. to negotiate any aspect of a proposal, including price;
9. to terminate negotiations regarding any and all proposals at any time;
10. to expressly waive any defect or technicality in any proposal;
11. to rescind a selection prior to agreement execution if PHDC determines that the proposal does not conform to the specifications of this RFP;
12. to rescind a selection prior to agreement execution if PHDC determines that the specifications contained in this RFP are not in conformity with law or that the process in selection of a proposal was not in conformity with law or with the legal obligations of PHDC;
13. in the event a contract is awarded, the successful Applicant shall procure and maintain during the life of the contract liability insurance in an amount to be determined prior to the award of any agreement;
14. in the event an agreement is awarded, Applicant agrees to perform its services as an independent contractor and not as an employee or agent of PHDC;
15. in the event an agreement is awarded, all Applicants agree that no portion of performance of the agreement shall be subcontracted without the prior written approval of PHDC; and
16. each Applicant agrees to indemnify, protect and hold harmless PHDC and the City from any and all losses, injuries, expenses, demands and claims against PHDC or the City sustained or alleged to have been sustained in connection with or resulting from (i) the submission of the Applicant's proposal; (ii) the delivery by the Applicant to PHDC of any other documents or information; and (iii) any other conduct undertaken by the Applicant in furtherance of or in relation to the Applicant's proposal. Each Applicant agrees that its duty to indemnify and hold harmless shall not be limited to the terms of any liability insurance, if any, required under this RFP or subsequent agreement.

Neither PHDC or the City is under any obligation whatsoever to any Applicant as a result of this RFP. The RFP does not represent any commitment on the part of PHDC and/or the City to any Applicant. In no event shall PHDC and/or the City be responsible for any cost, expense or fee incurred by or on behalf of any Applicant in connection with the RFP. Applicants shall be solely responsible for all such costs, expenses and fees.

NOTICE: Any information provided in your response to this RFP may be subject to disclosure to the public. Documents provided in response to this RFP may also be required to be disclosed by applicable law, subpoena, and/or court order.

Attachment A

Philadelphia Tax Status Certification Request

PHILADELPHIA TAX STATUS CERTIFICATION REQUEST

CITY OF PHILADELPHIA DEPARTMENT OF REVENUE

REQUESTER: PHA PHDC PIDC PPA PRA OTHER _____

Taxpayer Name: _____ Date: _____

Taxpayer Trading As: _____

Home Address: _____

Business Address: _____ Business Phone #: _____

1. Are you a Registered Taxpayer? YES NO

If so, provide your Federal Employer Identification Number here: _____

If so, provide your Philadelphia Business Tax Account Number here: _____

If so, provide your Social Security Number here: _____

2. Identify all of your subsidiaries and affiliates: _____

3. Are you or any of your subsidiaries or your affiliates presently delinquent in any City of Philadelphia School District taxes, business taxes and/or others taxes? YES NO

If so, what tax(es) and amount(s) owed? _____

4. Are you or any of your subsidiaries or affiliates presently delinquent in Water and Sewer charges? YES NO

If so, amount owed: \$ _____

5. Have you or any of your subsidiaries or affiliates been sued by the City of Philadelphia or the Philadelphia School District? YES NO

Have you declared bankruptcy? YES NO

If so, list date and nature of lawsuit or filing date of bankruptcy petition: _____

6. Are you or any of your subsidiaries or affiliates involved in any other business activity? YES NO

If so, list company name(s) and account numbers here and describe activity: _____

7. Do you or any of your subsidiaries or affiliates own real estate? YES NO

If so, list address(es) here or on the back of this form: _____

I hereby affirm that the information provided above is true and correct to the best of my knowledge, information and belief; said affirmation being made subject to the penalties prescribed by 18 Pa. C.S.A. Sec. 4904 relating to unsworn falsification to authorities.

Name: (Please Print) _____

Title: _____

Signature: _____

Date: _____

CONFLICT OF INTEREST

All applicants are required to comply with federal, state and local regulations prohibiting conflicts of interest. The regulations concern the following groups of people:

- A. Employees, consultants, officers, or elected or appointed officials of the City of Philadelphia, Philadelphia Redevelopment Authority, Philadelphia Land Bank, or Philadelphia Housing Development Corporation.
- B. Employees, consultants, or officers of any organization or business receiving federal, state or local funds or participating in a government housing program (including, but not limited to, Philadelphia Housing Development Corporation, Philadelphia Industrial Development Corporation and city-funded non-profits housing entities).

1. Are you now, or have you been during the preceding year, in one of the categories (A or B) described above?

YES NO

2. Is any member of your family or your spouse's family now, or have they been during the preceding year, in one of the categories (A or B) described above?

(Family members include spouses, parents, brothers, sisters, or children).

YES NO

- If yes, please state the nature of your relationship and briefly describe your family member's duties or title with respect to the organization or business.

3. Is any person with whom you have a business relationship, or with whom you have had a business relationship during the preceding year, in one of the categories (A or B) described above?

(A person with whom you have a business relationship includes your employees, partners, shareholders, officers or directors).

YES NO

- If yes, please state the nature of your relationship and briefly describe that person's duties or title with respect to the organization or business.

CONFLICT OF INTEREST

4. Does or will any person in one of the categories (A or B) described above have any interest in any contract for materials or services related to the project or property for which you are applying?

YES NO

Briefly describe the nature of that person's interest in the contract for materials or services.

ADDITIONAL DISCLOSURES

1. Do you own any property that is subject to any significant unresolved violation of City codes and ordinances?

YES NO

2. As a property owner, have you been involved in Philadelphia tax foreclosure proceeding in the last five years?

YES NO

3. Have you or any member of your development team been convicted of any felony within the past five years?

YES NO

4. Are you listed as an owner of record on the Philadelphia District Attorney's list of land that has been confiscated due to criminal activity?

YES NO

5. Has the developer or its principals been a developer, stockholder, officer, director, trustee, member, or partner in any other development projects with the Philadelphia Redevelopment Authority, Philadelphia Land Bank, the City of Philadelphia, or the Philadelphia Housing Development Corporation?

If yes, provide the following information:

YES NO N/A

	Project Name	Date	Agency	Agency Role
1.	_____			
2.	_____			
3.	_____			
4.	_____			

Please include any additional projects on a separate sheet.

CERTIFICATION

I do hereby declare that I have filed the foregoing Statement of Interest and do hereby certify that the statements made in the foregoing Statement are true and correct to the best of my knowledge, information, and belief. I understand that false statements made herein are subject to the penalties of the Act of December 6, 1972, PLI 1482, No. 334, as amended, 18 PA. C. A 4904, relating to unsworn falsification to authorities.

Signature _____

Date _____

NOTICE: If you are completing the foregoing documents for the Philadelphia Redevelopment Authority (the "PRA") or the Philadelphia Land Bank (the "PLB"), please note that the PRA and the PLB are subject to the Pennsylvania Right to Know Law and as such, any information provided in any of the foregoing documents may be subject to disclosure to the public.

Attachment B

Disclosure Forms

**Philadelphia Housing Development Corp. (PHDC), Philadelphia Redevelopment Authority (PRA),
Philadelphia Land Bank (PLB)**

Disclosure Forms

Directions:

1. Please read the following information regarding the completion of these disclosure forms. Please review the definitions prior to completing any form.
2. Date and initial the top of each form after you have completed it and sign the form on the last page.
3. NOTE: There are two different types of campaign contribution disclosure forms: one for those who are applying as individuals and one for those applying as businesses. Only fill out one type of form. (If you have used a consultant with respect to applying for this financial assistance you will have to fill out a campaign contribution disclosure form for them as well.)

Getting Started

There are five sets of disclosure forms enclosed in this packet. You must provide information for each disclosure form. The information you must disclose includes:

1. Any contributions (defined as a provision of money, in-kind assistance, discounts, forbearance or any other valuable thing) made during the two years prior to the application submission date or prior to your receipt of financial assistance in the absence of an application;
2. The name of any consultant(s) you used to help in obtaining this financial assistance and any campaign contributions they have made;
3. Any subcontractors you are planning to use if awarded this financial assistance;
4. Whether a City or Housing Agency (PHDC, PRA, PLB) employee or official asked you to give money, services, or any other thing of value to any individual or entity; and
5. Whether a City or Housing Agency (PHDC, PRA, PLB) employee or official gave you any advice on how to satisfy any minority, women, disabled or disadvantaged business participation goals.

More information on Disclosing Campaign Contributions

Applicants for financial assistance must disclose any contributions they made to:

- A candidate for nomination or election in any public office in the Commonwealth of Pennsylvania
- An incumbent in any public office in the Commonwealth of Pennsylvania
- A political committee or state party in the Commonwealth of Pennsylvania
- A group, committee, or association organized in support of any candidate, office holder, political committee or state party in the Commonwealth of Pennsylvania

The types of contributions that must be disclosed include:

- Any advance or deposit of money, gift, or any other valuable thing given to a candidate or political committee for the purpose of influencing any election in the Commonwealth of Pennsylvania
- The purchase of tickets for events such as dinners, luncheons, rallies and all other fund-raising events
- Granting of rebates or discounts not available to the general public or rebates by television and radio stations and newspapers not extended on an equal basis to all candidates
- Any payments made on behalf of the candidate not made by either the candidate or their committee

Attribution Rules. In addition to disclosing contributions made directly by the applicant, the applicant will be asked to supply information on other types of contributions. The campaign contribution disclosure forms will include questions that specifically ask for information on these other types of contributions. These contributions will be attributed to the individual or business and will be used to determine the applicant's eligibility to receive financial assistance.

Businesses (i.e. corporation, limited liability company, partnership association, joint venture, or any other legal entity) have to disclose contributions made by the following:

- Applicant business
- Parent, subsidiary, or otherwise affiliated entity of the applicant business ("affiliate")
- An individual or business that is then reimbursed by the applicant business or affiliate

- Officers, directors, controlling shareholders, or partners of the for-profit applicant business or for-profit affiliate
- Political action committee controlled by applicant business or affiliate
- Political action committee controlled by officer, director, controlling shareholder, or partner of the for-profit applicant business or for-profit affiliate

Individuals have to disclose contributions made by the following:

- Applicant individual
- Member of individual's immediate family (i.e., spouse, life partner, or dependent child living at home), when contributions are in excess of \$3,000.

In addition to direct contributions to candidates, incumbents, or political committees in the Commonwealth of Pennsylvania, applicants are also required to disclose:

1. Contributions not directly given to a candidate, incumbent, or political committee but made with the intent that the contribution will benefit the candidate, incumbent, or political committee;
2. Solicitation of contributions on behalf of a candidate, incumbent, or political committee, including the hosting of or solicitation at fundraising events (required to disclose details regarding the date of event and amount raised); and
3. Contributions not made directly by the individual/business to a candidate, incumbent, or political committee but furnished by the individual / business (as an "intermediary").

Eligibility Restrictions

Effective as of January 1, 2016, if an individual makes contributions totaling over \$3,000 in one calendar year to a candidate for City elective office or to an incumbent, the individual is not eligible to apply for, or enter into, any Non-Competitively Bid Contract in excess of \$10,000, nor shall said individual be eligible to be a sub-contractor (at any tier) of any such contract during that candidate's or incumbent's term of office. The monetary limits in effect for individuals prior to January 1, 2016 remain in effect for purposes of determining an individual's eligibility during the two year disclosure period prior to the date an individual's application in response to a contract opportunity is due or for determining an individual's continuing compliance during the term of any such contract that is awarded to the individual. For the period February 1, 2006 through December 31, 2007, the contribution limit amount is \$2,500; for the period January 1, 2008 through December 31, 2011, the contribution limit amount is \$2,600; for the period January 1, 2012 through December 31, 2015, the contribution limit amount is \$2,900.

Effective as of January 1, 2016, if a business makes contributions totaling over \$11,900 in one calendar year to a candidate for City elective office or to an incumbent, the business is not eligible to apply for, or enter into, any Non-Competitively Bid Contract in excess of \$25,000, nor shall said individual be eligible to be a sub-contractor (at any tier) of any such contract during that candidate's or incumbent's term of office. The monetary limits in effect for businesses prior to January 1, 2016 remain in effect for purposes of determining a business' eligibility during the two year disclosure period prior to the date a business' application in response to a contract opportunity is due or for determining a business' continuing compliance during the term of any such contract that is awarded to the business. For the period February 1, 2006 through December 31, 2007, the contribution limit amount is \$10,000; for the period January 1, 2008 through December 31, 2011, the contribution limit amount is \$10,600; for the period January 1, 2012 through December 31, 2015, the contribution limit amount is \$11,500.

→ **Note on Eligibility:** If a candidate for any City elective office contributes \$250,000 or more from his or her personal resources to his or her campaign, then the eligibility thresholds for individuals and businesses shall double with respect to contributions to all candidates for that same elective office (i.e. \$6,000 for individuals and \$23,800 for businesses).

Definitions

Affiliate	A parent, subsidiary, or otherwise affiliated entity of a business
Applicant	An individual or business who has filed an application to be awarded a non-competitively bid contract or financial assistance
Business	A corporation, limited liability company, partnership, association, joint venture or any other legal entity (including non-profit organizations) other than an Individual
Candidate	Any individual who seeks nomination or election to public office, other than a judge of elections or inspector of elections, whether or not such individual is nominated or elected. An individual shall be deemed to be seeking nomination or election to such office if he or she has (1) received a contribution or made an expenditure or has given his consent for any other person or committee to receive a contribution or make an expenditure, for the purpose of influencing his or her nomination or election to such office, whether or not the individual has made known the specific office for which he or she will seek nomination or election at the time the contribution is received or the expenditure is made; or (2) taken the action necessary under the laws of the Commonwealth of Pennsylvania to qualify himself or herself for nomination or election to such office.
Consultant	A person used by an applicant to assist in obtaining the financial assistance through direct or indirect communication by such individual or business with any City Housing Agency (PHDC, PRA, PLB) or the organizations providing financial assistance or any City officer or employee or officer or employee of the organization providing financial assistance, if the communication is undertaken by such individual or business in exchange for, or with the understanding of receiving, payment from the applicant; provided, however, that "Consultant" shall not include a full-time employee of the applicant.
Contributions	<p>The provision of money, in-kind assistance, discounts, forbearance or any other valuable thing, during the two years prior to the deadline for the filing of the application for the contract opportunity or financial assistance, to any of the following:</p> <ul style="list-style-type: none"> – a candidate for nomination or election to any public office in the Commonwealth of Pennsylvania; – an incumbent in any public office in the Commonwealth; – a political committee or state party in the Commonwealth; or – a group, committee or association organized in support of any candidate, office holder, political committee or state party in the Commonwealth.
Financial Assistance	Any grant, loan, tax incentive, bond financing subsidy for land purchase or otherwise, or other form of assistance that is realized by or provided to a person in the amount of fifty thousand dollars (\$50,000) or more through the agencies or approval of the City, including, but not limited to, Tax Increment Financing (TIF) aid, industrial development bonds, use of the power of eminent domain, Community Development Block Grant (CDBG) aid or loans, airport revenue bonds, and Enterprise Zone or similar economic development zone designations (such as Keystone Opportunity Zones, Keystone Opportunity Expansion Zones, Keystone Opportunity Improvement Zones, and Economic Development District Zones), but not including any assistance to which a person is entitled under a law enacted before the individual or business applied for or requested such assistance.
Immediate family	A spouse or life partner residing in the individual's household or minor dependent children

Incumbent	An individual who holds elective office
Intermediary	A person, who, other than in the regular course of business as a postal, delivery or messenger service, delivers a contribution from another individual or business to the recipient of such contribution
Person	An individual, corporation, limited liability company, partnership, association, joint venture, or any other legal entity
Political committee	Any committee, club, association or other group of persons which receives money or makes expenditures for purposes of influencing any election
Solicit a Contribution	Requesting or suggesting that a person make a contribution. The sponsoring or hosting of a fundraising event is considered soliciting a contribution from the attendees of the event. Any contributions raised at such event are counted as a contribution made by the host of the event.

Date: _____

Initials: _____

If Applying as an Individual:
Campaign Contribution Disclosure Form

Please read through the directions and definitions before filling out this disclosure form to make sure that each question is answered appropriately and thoroughly. Note that you must provide information for the two years prior to the application deadline.

	Yes	No
Have you made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>
Have you solicited or served as an intermediary for any contributions?	<input type="checkbox"/>	<input type="checkbox"/>
Has a member of your immediate family made any contributions over and above \$3,000?	<input type="checkbox"/>	<input type="checkbox"/>
Has a member of your immediate family solicited or served as an intermediary for contributions over and above \$3,000?	<input type="checkbox"/>	<input type="checkbox"/>
<i>Check here to certify that no contributions were made.</i>	<input type="checkbox"/>	

Additional information on every contribution must be disclosed.
Please use the table provided on the next page.

Date: _____

Initials: _____

If Applying as a Business:
Campaign Contribution Disclosure Form

Please read through the directions and definitions before filling out this disclosure form to make sure that each question is answered appropriately and thoroughly. Where “non-profit” is an option, indicate whether the business is a non-profit; non-profits are not required to disclose contribution information on these questions. Note that you must provide information for the two years prior to the application deadline.

	Yes	No	Non-Profit
Has the business made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has the business solicited or served as an intermediary for any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of the business made any contributions? See note below.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has an officer, director, controlling shareholder, or partner of the business solicited or served as an intermediary for any contributions? See note below.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has an affiliate of the business made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an affiliate of the business solicited or served as an intermediary for any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of a for-profit affiliate of the business made any contributions? See note below.	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of a for-profit affiliate of the business solicited or served as an intermediary for any contributions? See note below.	<input type="checkbox"/>	<input type="checkbox"/>	
Has the business or an affiliate of the business reimbursed another individual or business for a contribution that the individual or business has made?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of a for-profit business, or of a for-profit affiliate of the business, reimbursed another individual or business for a contribution that the individual or business has made?	<input type="checkbox"/>	<input type="checkbox"/>	
Has a political committee controlled by the business or by an affiliate of the business made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has a political committee controlled by an officer, director, controlling shareholder, or partner of the for-profit business, or of a for-profit affiliate of the business, made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Check here to certify that no contributions were made.</i>		<input type="checkbox"/>	

Note: Applicants must disclose all contributions to candidates or incumbents which are attributed to an immediate family member of an officer, director, controlling shareholder or partner of the for-profit Applicant or the for-profit affiliate of the Applicant. Please disclose the full amount of the contribution, although only the amount above \$3000 may potentially be attributed to the officer, director, controlling shareholder or partner (and, by extension, the Applicant business).

Additional information on every contribution must be disclosed.
Please use the table provided on the next page.

Date: _____

Initials: _____

If Applying as a Business:
Campaign Contribution Disclosure Form

For relationship, indicate whether the contributor was the Business, Affiliate, Controlled Political Committee, Controlling Shareholder, Director, Officer, Parent, Partner, Reimbursed Contributor, Solicited Contributor, Subsidiary, or Other.

Name of Contributor	Relationship <small>(to individual or business completing this form)</small>	Name of Recipient	Date of Contribution	Amount of Contribution

Please use additional pages as needed.

Date: _____

Initials: _____

Use of Consultant Disclosure Form

Please list all consultant(s) used in the year prior to the application deadline and the corresponding information for that consultant in the space provided below.

Please note that a Consultant, for the purposes of the required disclosures, is defined as an individual or business used by an applicant or contractor to assist in obtaining financial assistance through direct or indirect communication by such individual or business with any of the three City Housing Agencies, the organization providing financial assistance, any City officer/employee, or any officer/employee of the organization providing financial assistance, if the communication is undertaken in exchange for, or with the understanding of receiving, payment from the applicant or contractor or any other individual or business (however, "Consultant" shall not include a full-time employee of the Applicant or Contractor).

Check here to certify that no consultant(s) was used in the year prior to the application deadline.	<input type="checkbox"/>
Consultant Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid	
Consultant Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid	
Consultant Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid	
Consultant Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid	

Date: _____

Initials: _____

Consultant: Individual Campaign Contribution Disclosure Form

Use this form if the Consultant used is an Individual. Please read through the directions and definitions before filling out this disclosure form to make sure that each question is answered appropriately and thoroughly. Note that you must provide information for the two years prior to the application deadline.

	Yes	No
Has the Consultant made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>
Has the Consultant solicited or served as an intermediary for any contributions?	<input type="checkbox"/>	<input type="checkbox"/>
Has a member of the Consultant's immediate family made any contributions over and above \$3,000?	<input type="checkbox"/>	<input type="checkbox"/>
Has a member of the Consultant's immediate family solicited or served as an intermediary for contributions over and above \$3,000?	<input type="checkbox"/>	<input type="checkbox"/>
<i>Check here to certify that no contributions were made.</i>	<input type="checkbox"/>	

Additional information on every contribution must be disclosed.
Please use the table provided on the next page.

Date: _____

Initials: _____

Consultant: Individual Campaign Contribution Disclosure Form

Use this form if the Consultant used is an Individual. For relationship, indicate whether the contributor was the Individual or Family Member.

Name of Contributor	Relationship to Consultant	Name of Recipient	Date of Contribution	Amount of Contribution

Please use additional pages as needed.

Date: _____

Initials: _____

Consultant: Business Campaign Contribution Disclosure Form

Use this form if the Consultant used is a Business. Please read through the directions and definitions before filling out this disclosure form to make sure that each question is answered appropriately and thoroughly. Where “non-profit” is an option, indicate whether the business is a non-profit; non-profits are not required to disclose contribution information on these questions. Note that you must provide information for the two years prior to the application deadline.

	Yes	No	Non-Profit
Has the Consultant business made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has the Consultant business solicited or served as an intermediary for any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of the Consultant business made any contributions? <i>See note below.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has an officer, director, controlling shareholder, or partner of the Consultant business solicited or served as an intermediary for any contributions? <i>See note below.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has an affiliate of the Consultant business made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an affiliate of the Consultant business solicited or served as an intermediary for any contributions? <i>See note below.</i>	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of a for-profit affiliate of the Consultant business made any contributions? <i>See note below.</i>	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of a for-profit affiliate of the Consultant business solicited or served as an intermediary for any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has the Consultant business or an affiliate of the business reimbursed another individual or business for a contribution that the individual or business has made?	<input type="checkbox"/>	<input type="checkbox"/>	
Has an officer, director, controlling shareholder, or partner of the for-profit Consultant business, or of a for-profit affiliate of the Consultant business, reimbursed another individual or business for a contribution that the individual or business has made?	<input type="checkbox"/>	<input type="checkbox"/>	
Has a political committee controlled by the Consultant business or by an affiliate of the business made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
Has a political committee controlled by an officer, director, controlling shareholder, or partner of the for-profit Consultant business, or of a for-profit affiliate of the Consultant business, made any contributions?	<input type="checkbox"/>	<input type="checkbox"/>	
<i>Check here to certify that no contributions were made.</i>		<input type="checkbox"/>	

Note: Consultants must disclose all contributions to candidates or incumbents which are attributed to an immediate family member of an officer, director, controlling shareholder or partner of the for-profit Consultant or the for-profit affiliate of the Consultant. Please disclose the full amount of the contribution, although only the amount above \$3000 will be attributed to the officer, director, controlling shareholder or partner (and, by extension, the Consultant business).

Additional information on every contribution must be disclosed.
Please use the table provided on the next page.

Date: _____

Initials: _____

Consultant: Business Campaign Contribution Disclosure Form

Use this form if the Consultant used is a Business. For relationship, indicate whether the contributor was the Consultant Business, Affiliate, Controlled Political Committee, Controlling Shareholder, Director, Officer, Parent, Partner, Reimbursed Contributor, Solicited Contributor, Subsidiary, or Other.

Name of Contributor	Relationship to Consultant	Name of Recipient	Date of Contribution	Amount of Contribution

Please use additional pages as needed.

Use of Subcontractor Disclosure Form

Please list all subcontractor(s) you are planning to use if awarded this financial assistance by filling out the appropriate information in the space provided below.

Check here to certify that no subcontractor(s) are to be used.	<input type="checkbox"/>
Subcontractor Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid, or Percentage to be Paid	
Subcontractor Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid, or Percentage to be Paid	
Subcontractor Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid, or Percentage to be Paid	
Subcontractor Name	
Address 1	
Address 2	
City, State, Zip	
Phone	
Amount Paid or to be Paid, or Percentage to be Paid	

Employee Request Form

Please list any City or Housing Agency (PHDC, PRA, PLB) employees or officers or employees/officers of the organizations providing financial assistance who have asked you (the Applicant), any officer director, or management employee of the Applicant, or any person representing the Applicant to give money, services, or any other thing of value (other than contributions as defined above) during the two years prior to the application deadline.

Check here to certify that no City or Housing Agency (PHDC, PRA, PLB) employees/officers or employees/officers of the organizations providing financial assistance have asked you (the Applicant), any officer director, or management employee of the Applicant, or any person representing the Applicant to give money, services, or any other thing of value (other than contributions as defined above) during the two years prior to the application deadline.	<input type="checkbox"/>
Name of Employee/Officer	
Title	
Money Services, or Thing of Value Requested	
Money, Services, or Thing of Value Given (If none, write "none")	
Date Requested	
Date of Payment	
Name of Employee/Officer	
Title	
Money Services, or Thing of Value Requested	
Money, Services, or Thing of Value Given (If none, write "none")	
Date Requested	
Date of Payment	
Name of Employee/Officer	
Title	
Money Services, or Thing of Value Requested	
Money, Services, or Thing of Value Given (If none, write "none")	
Date Requested	
Date of Payment	

Employee Participation Advice Disclosure Form

Please list any City or Housing Agency (PHDC, PRA, PLB) employees or officers employees/officers of the organizations providing financial assistance who gave you (the Applicant), any officer director, or management employee of the Applicant, or any person representing the Applicant advice that a particular individual or business could be used by the Applicant to satisfy any goals established in the contract or financial assistance agreement for the participation of minority, women, disabled, or disadvantaged business enterprises during the two years prior to the application deadline.

Check here to certify that no City or Housing Agency (PHDC, PRA, PLB) employees/officers or employees/officers of the organizations providing financial assistance gave you (the Applicant), any officer director, or management employee of the Applicant, or any person representing the Applicant advice that a particular individual or business could be used by the Applicant to satisfy any goals established in the contract or financial assistance agreement for the participation of minority, women, disabled, or disadvantaged business enterprises during the two years prior to the application deadline.	<input type="checkbox"/>
Name of Employee/Officer	
Title	
Date of Advice	
Individual or Business Recommended to Satisfy Participation Goals	
Name of Employee/Officer	
Title	
Date of Advice	
Individual or Business Recommended to Satisfy Participation Goals	
Name of Employee/Officer	
Title	
Date of Advice	
Individual or Business Recommended to Satisfy Participation Goals	
Name of Employee/Officer	
Title	
Date of Advice	
Individual or Business Recommended to Satisfy Participation Goals	

Philadelphia Housing Development Corp., Philadelphia Redevelopment Authority, Philadelphia Land Bank

Signature

In order for the submission of these disclosure forms to be considered valid, they must be properly signed below by the respondent. Disclosure forms **that are not signed will be rejected**. By signing your name and title in the signature space below, you, as the respondent, signify your intent to sign these disclosure forms. The signatory hereby declares and certifies themselves to be the respondent, declares and certifies that they are properly authorized to execute these disclosure forms, and represents and covenants that all of the information and disclosures provided to the best of their knowledge are true and contain no material misstatements or omissions. Breach of such representation and covenant may render any subsequent provision of financial assistance voidable, and entitle the City (or Housing Agency (PHDC, PRA, PLB) to all rights and remedies provided by law or equity.

If these disclosure forms are being submitted by an INDIVIDUAL, PARTNERSHIP, LIMITED LIABILITY COMPANY OR MANAGED LIMITED LIABILITY COMPANY, sign the forms here:

Signature

Date

Name

Title

If these disclosure forms are being submitted by a CORPORATION, sign the forms here, with signatures by (a) President or Vice-President of the corporation AND (b) Secretary, Assistant Secretary, Treasurer or Assistant Treasurer of the corporation. If the disclosure forms are not signed by the above mentioned, you hereby certify that you are authorized pursuant to a certified corporate resolution to sign in place of such officers.

Signature

Date

Name

President/Vice President, if other, please specify

Signature

Date

Name

*Secretary/Asst. Secretary/Treasurer/Asst. Treasurer
If other, please specify*

Attachment C

Insurance Requirements

Attachment C - Insurance Requirements

The individual or entity seeking to enter into a contract with the Philadelphia Housing Development Corporation ("PHDC") or who is entering into a contract with such individual or entity (collectively, the "**Contracting Party**") will procure and maintain during the entire period of the contract, the insurance described below. All coverages must be provided by an insurance company authorized to do business in the Commonwealth of Pennsylvania and with a minimum A.M. Best Rating of A- Class VIII. All insurance, except Professional Liability, must be written on an "Occurrence Basis" and not a "Claims-Made Basis."

The insurance policies must provide for at least thirty (30) days prior written notice to be given to PHDC in the event that coverage is materially changed, cancelled or non-renewed or once any policy limits have been exhausted by fifty percent (50%). In the event of material change, cancellation or non-renewal of coverage(s), the Contracting Party must replace the coverage(s) to comply with the contract requirements to prevent a lapse of coverage for any time period during the term of the contract.

The Contracting Party will provide PHDC with the provisions from each of the required insurance policies or endorsements for each of the required insurance policies stating the following:

- 1) Contracting Party's insurance coverage is on a primary and non-contributory basis with any insurance carried or administered by PHDC;
- 2) includes coverage for ongoing operations and completed operations;
- 3) Philadelphia Housing Development Corporation, the City of Philadelphia (the "**City**") and their respective officers, directors, employees and agents are named as additional insured on a primary and non-contributory basis on all of the insurance policies, except for workers' compensation and professional liability insurance policies, even for claims regarding their partial negligence;
- 4) includes a waiver of subrogation in favor of PHDC and all of the other aforementioned additional insureds;
- 5) coverage is applicable separately to each insured against whom a claim is made or suit is brought and there is no "Cross Liability" exclusion on the insurance policies that preclude coverage for suits or claims between the Contracting Party and PHDC or between PHDC and any other insured or additional insured under the insurance policies; and
- 6) no act or omission of PHDC, the City, or their respective officers, directors, employees or agents will invalidate coverage.
- 7) Contracting Party shall not have a Self-Insured Retention ("**SIR**") on any policy greater than \$50,000, which is the responsibility of the Contracting Party. If Contracting Party's policy(ies) has a SIR exceeding this amount, approval must be received from PHDC prior to starting work. In the event any policy includes an SIR, the Contracting Party is solely responsible for payment within the SIR of their policy(ies) and the Additional Insured requirements specified herein shall be provided within the SIR amount(s).

Endorsement forms required include CG 20 01, CG 20 10 and CG 20 37 as published by the Insurance Services Office ("ISO") or on equivalent forms that are satisfactory to PHDC. If the contract pertains to a specific property, the property address must be identified on the Certificate of Insurance. Otherwise a contract/work order number or project reference should be included.

Certificates of Insurance must be addressed to: Philadelphia Housing Development Corporation, 1234 Market Street, 16th floor, Philadelphia, PA 19107.

PHDC reserves the right to request and obtain complete copies of the Contracting Party's insurance policies.

I. Insurance Review - Insurance requirements are subject to the periodic review by PHDC. Any failure, actual or alleged, on the part of PHDC to monitor or enforce compliance with any of the insurance requirements will not be deemed as a waiver of any rights on the part of PHDC. PHDC may require additional types of insurance or higher limits if, in its sole discretion, the potential risk warrants it. The amount of insurance provided in the required insurance coverages outlined below, shall not be construed to be a limitation of the liability on the part of the Contracting Party.

II. Without in any way affecting the indemnity obligations of the Contracting Party pursuant to its contract with PHDC and in addition thereto, the insurance coverage required by all Contracting Parties is as follows:

- a. **Commercial General Liability**: The policy will include a "Cross Liability" endorsement, name PHDC, the City, and their respective officers, directors, employees and agents as **Additional Insured** and include coverage for all operations performed by or on behalf of the Contracting Party for bodily injury and property damage arising out of:

- Products and Completed Operations
- Premises Operations and Mobile Equipment
- Independent Contractors
- Employees and Volunteers as Additional Insured
- Elevators and/or Escalators (if applicable)
- Blanket Contractual Liability (written and oral and must include liability for employee injury assumed under a contract as provided in the standard ISO policy form)
- No amendment to the definition of an "Insured Contract"
- No sexual abuse and molestation exclusion
- Broad Form Property Damage (including completed operations)
- Coverage for Resulting Damage (Expanded Definition of Occurrence-Property Damage)
- Explosion, Collapse and Underground Hazards
- Personal Injury and Advertising Injury

No Exclusions for residential construction with respect to the work to be completed by the Contracting Party (if applicable)

- The following minimum limits will be provided:
\$1,000,000 Each Occurrence (combined single limit for bodily injury (including death) and property damage)
\$1,000,000 Personal and Advertising Injury
\$2,000,000 General Aggregate (other than Products/Completed Operations)
\$1,000,000 Products/Completed Operations Aggregate

- The General Aggregate Limit must apply on a Per Project basis.

- The definition of "occurrence" must be expanded via endorsement to state the following:

"Occurrence" means an accident, including continuous or repeated exposure to substantially the same general harmful conditions. Faulty workmanship in "your work" is not an "occurrence" but "property damage" that is ancillary and accidental damage caused by faulty workmanship in "your work" is considered an "occurrence" if the following conditions are met:

- 1) faulty workmanship in "your work" causes "property damage" to property other than "your work;" and
- 2) such "property damage" was not expected or intended by you or the persons performing "your work."

b. **Workers' Compensation and Employer's Liability Insurance:** The Contracting Party will obtain a workers' compensation policy which provides benefits in accordance with the statutory requirements of the Commonwealth of Pennsylvania and includes "all states" coverage or at least coverage in all other states in which the Contracting Party performs work or through which the Contracting Party's employees travel. This policy will also include coverage for United States Longshoremen and Harbor Workers (if applicable) and employer's liability. The following minimum employer's liability limits will be provided:

\$100,000 Each Accident	Bodily Injury by Accident
\$100,000 Each Employee	Bodily Injury by Disease
\$500,000 Policy Limit	Bodily Injury by Disease

- Coverage should cover all individuals, including volunteers, providing services on behalf of the Contracting Party.

c. **Automobile Liability Insurance:** The policy will name PHDC, the City, their officers, directors, employees and agents as **Additional Insured** and cover liability

arising out of the use of all owned, non-owned and hired automobiles (or symbol 1 - Any Auto) with the following minimum coverages:

\$1,000,000 Per Occurrence (combined single limit for bodily injury (including death) and property damage)

- For Contractor(s) involved in the transportation of hazardous material, include the following endorsements: MCS-90 and ISO-9948

- Contractual Liability Coverage (including liability for employee injury assumed under a contract as provided in the standard ISO policy form)

- Coverage for all owned automobiles will be waived if the Contracting Party does not own any automobiles so long as the Contracting Party provides PHDC with a letter stating that the Contracting Party does not own any automobiles. The letter must be on company letterhead and executed by an individual authorized to make such a representation on behalf of the Contracting Party. When the Contracting Party does not own any automobiles, coverage for non-owned and hired automobiles must be endorsed to the commercial general liability policy or provided under a separate non-owned and hired automobile liability policy.

d. **Professional Liability:** Professional Liability Insurance with a minimum policy limit of \$1,000,000 per claim and aggregate with a deductible not to exceed \$25,000. This insurance shall extend to the Contracting Party and its legal representatives in the event of death, dissolution or bankruptcy, and cover provided will cover all actual or alleged acts, errors and omissions arising out of the professional services rendered by the Contracting Party's agents, employees or any person for whom the Contracting Party is responsible in the performances of the services under the contract as well as liability assumed under the contract. The retroactive date must be on or prior to the contract date. The Contracting Party will also obtain tail coverage or an extended reporting period or maintain its current coverage for occurrences happening during the performance of the contract for at least 2 years after completion of the contract.

e. **Excess/Umbrella Liability:** Excess/umbrella liability insurance with a minimum limit of \$1,000,000 for each occurrence and the annual aggregate amount that will apply in excess of the commercial general liability, automobile liability, and employer's liability insurance policies.