

## ***FY2021 PROFESSIONAL SUBMISSION FORMAT***

The following is a list of information that the Bidder should include in their bid submission:

### **Summary of Bidder Background:**

- Bidder (s) Name (s)
- Bidder's Address
- Bidder's contact information and preferred method of communication
- Legal Form of Bidder (Sole Proprietor, Partnership, Corporation)
- Date Bidder's company formed
- Description of Bidder's company in terms of size, range, and types of services offered and clientele
- Bidder's principal officers (e.g. President, Chairman, Vice-President, Chief Operating Officer, Chief Financial Officer and the length of time each officer has performed in his/her field of expertise)
- Bidder's Federal Employee Identification Number
- Evidence of legal authority to conduct business in Dallas County (e.g. business license number)
- Evidence of established track record for providing services and/or deliverables that are subject to this bid proposal
- Organizational chart showing key personnel that would provide services to the Community Council of Greater Dallas/Dallas Area Agency on Aging

### **Financial Information:**

- State whether the Bidder has ever filed for bankruptcy or any form of Reorganization under the Bankruptcy Code
- State whether the Bidder has ever received any sanctions or is currently under investigation by any regulatory or governmental body

### **Proposed Outcome:**

- Summary of timeline and work to be completed

**Cost Proposal Summary and Breakdown:**

- Standard hourly rate for desk review/financial reports review and report services
- Standard Hourly Rate for Annual Fiscal Monitoring Visit
- Summary and explanation of any other contributing expenses to the total cost
- Brief summary of the total cost of the bid proposal

**Licensing and Bonding:**

- Provide details of licenses and bonds (if any) for any proposed services that the Bidder may plan on providing for this project

**Insurance:**

- In order for you to become a service contractor with the Dallas Area Agency on Aging, you will need to add the Community Council, 1341 W. Mockingbird Lane, Suite 1000W, Dallas, TX 75247 as Additional Insured for both ongoing operations and completed operations.
- Our current requirements for service contractors is to provide a certificate of insurance certifying general liability coverage of at least the following:
  - \$2,000,000 General Aggregate
  - \$1,000,000 Products Completed Operations Aggregate
  - \$1,000,000 Occurrence
  - \$1,000,000 Personal Injury/Advertising Injury

**References:**

- Provide three business references, do not list yourself as a personal reference.

Bidder agrees that Community Council of Greater Dallas/Dallas Area Agency on Aging may contact all submitted references to obtain all information regarding Bidder's performance.