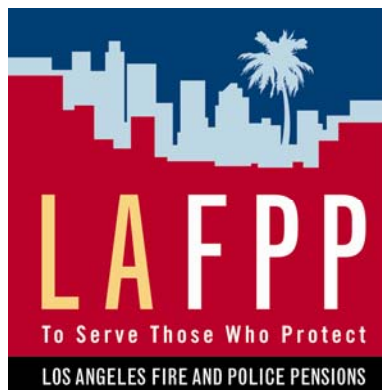

Request for Proposal

#COMM100

Request for Proposal for FINANCIAL PLANNING EDUCATION CONSULTANT



Los Angeles Fire and Police Pensions
360 East Second Street, Suite 400
Los Angeles, California 90012
www.lafpp.com

Proposals are due by 5:00 p.m. PDT
on
Monday, September 27, 2010



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1 Introduction

1.1 Purpose

Los Angeles Fire and Police Pensions (LAFPP) is requesting proposals from financial planning education providers to develop and conduct financial planning education seminars for the sworn active membership of LAFPP. The provider will develop and present objective and customized financial planning presentations, along with other related retirement planning topics such as estate planning. The seminars should be designed to suit the needs of two groups of members: those early in their career and those approaching retirement. The provider will conduct approximately 10-12 courses per year at a City of Los Angeles facility. In addition, the provider will also develop and conduct separate periodic workshops for members preparing to exit the Deferred Retirement Option Plan (DROP).

1.2 LAFPP Background

LAFPP, one of three pension systems in the City of Los Angeles, is a defined benefit, single-employer pension plan operating under the provisions of the Los Angeles City Charter and Administrative Code. The Plan is governed by a nine-member Board of Commissioners (Board) made up of five members appointed by the Mayor and four members elected by the active and retired system participants. LAFPP administers the pension funds of all sworn (fire, police and port police) employees of the City. It has been in existence since 1899.

Currently, each active member in the pension system belongs to one of five pension plans, referred to as "Tiers". The following table lists the status of Tiers 2 through 5 as of the last Fiscal Year ending June 30, 2009:

Tier	Total Members	Average Annual Salary	Average Years of Service	Average Age
2	167	\$121,813	30.7	53.6
3	977	\$101,892	15.3	43.4
4	435	\$106,243	16.7	41.2
5	12,223	\$97,570	12.7	39.6



Tier 5

- All sworn employees hired as of January 1, 2002 automatically become members of this tier.
- Pension Base: Final Average Salary (FAS) - 12-month average
- Retirement Eligibility: 20 years of service & minimum age of 50
- Deferred Pension Option: With at least 20 years if they leave employment covered by this pension system, they can elect a deferred retirement for which they will receive a pension when they reach the age of 50.
- Pension Percentage: 50% of their FAS at 20 years of service; accrue 3% in all subsequent years, except for the 30th year where they are given 4%. The maximum entitlement is 90% at 33 years of service.
- Cost-of-living-adjustments (COLA) for pensions: based on the Consumer Price Index for the Greater Los Angeles/Orange County/San Bernardino area; capped at 3%; there is also a discretionary COLA; and a COLA bank.

Deferred Retirement Option Plan (DROP)

DROP is an *optional voluntary* program that allows members eligible for retirement to work as an active employee while accumulating service pension payments in a DROP account. DROP participants are considered “retired” for purposes of pension calculations only; for all other purposes participants are considered as active members of their respective employing departments. The maximum amount of time a member can be in DROP is five years (60 months).

While in DROP, the monthly pension payment is held in an account with a guaranteed interest rate of 5% per annum. When participants decide to leave the DROP program (after 1 day or up to 5 years maximum) they are then required to terminate sworn employment with the Fire, Police or Harbor Department. Participants can take distribution of their accumulated DROP account balance in either a lump sum, as a roll-over, into another tax-qualified account or a combination of a partial lump sum distribution and roll-over. Then they begin to receive their monthly pension benefit.

- Participation in DROP is up to a maximum of 60 months (5 years);
- Members are eligible to join DROP if they are an active:
 - ❖ Tier 2 or Tier 4 member with at least 25 years of service;
 - ❖ Tier 3 or Tier 5 member with at least 25 years of service and at least 50 years of age;



- The decision to participate in DROP is irrevocable. (Members have 7 days after they apply to change their mind. After the end of the 7-day period, members cannot exit DROP without terminating employment.)

Other Information

A “Summary of Pension Plan Provisions” describing the benefits for each Tier is provided in Appendix C. In addition, copies of Los Angeles Fire and Police Pensions 2009 Annual Report and Summary Plan Descriptions are available on our Web site, www.lafpp.com. The legal texts of the City Charter for Tiers 2, 3 and 4, and the Administrative Code for Tier 5 are available at www.amlegal.com/los_angeles_ca/.

Deferred Compensation Plan of the City of Los Angeles

The City’s Deferred Compensation Plan is a governmental plan defined by Section 457(b) of the Internal Revenue Code, commonly called a 457 deferred compensation plan. Deferred compensation allows eligible employees to supplement any existing retirement/pension benefits by saving and investing before-tax dollars through voluntary salary deferral. Contributions and any earnings are tax-deferred until money is withdrawn, at retirement, when the retiree is typically in a lower tax bracket than while working. Investment options are offered through separately managed accounts and mutual funds. The City’s Deferred Compensation Plan is not administered by LAFPP.

Current Seminar Program:

Seminar 1: PLANNING FOR YOUR FUTURE

- Introduction
- Pre-retirement concerns: Debt management, college savings, insurance, estate planning
- LAFPP Benefits
- Savings and Investments
- Financial Planning for Retirement

Seminar 2: FINE-TUNING YOUR RETIREMENT PLANS

- Introduction
- LAFPP Benefits
- Social Security and Medicare
- Federal and State Tax Issues
- Financial Planning for Retirement
- Housing



- Health Issues
- Estate Planning
- Life Adjustments in Retirement

1.3 Minimum Requirements – Program Specifications

- 1.3.1 The firm selected must specialize in financial planning and have a wide knowledge base in related topics such as, money management, investments, insurance, college planning, retirement planning, tax planning, social security, etc. In addition, the firm must have the ability to keep current on any legal issues relative to these areas of financial planning that occur during the contract period, as well as any studies affecting this sworn member group.
- 1.3.2 These seminars are designed to provide our members a broad overview of major areas of retirement planning. LAFPP consciously avoids making specific recommendations regarding investments, investing or other areas of long term financial planning. Because of this, the Contractor (meaning the company hired and any speakers working for the company) cannot be directly in the business of providing individual financial counseling or legal advice. The Contractor shall not offer or provide this service to our members during the term of the contract. Furthermore, firms that do not have product affiliations will be given extra consideration.
- 1.3.3 Contractor shall develop two seminar formats (early career and approaching retirement) with separate instructional materials for each format.
- 1.3.4 Contractor shall develop a third seminar format for members exiting the DROP program with instructional materials.
- 1.3.5 The presentations should help members assess their financial needs in retirement, assess how well their defined benefit pension, DROP account and deferred compensation benefits will meet those needs, and develop strategies to meet their financial needs in retirement.
- 1.3.6 The instructional materials will be developed in conjunction with LAFPP and will be custom-tailored to the needs of Firefighters, Police Officers and Harbor Port Police Officers of the City of Los Angeles. The seminar manuals should be so constructed as to be a permanent part of our members' resource library for retirement planning.



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- 1.3.7 Contractor will meet with LAFPP staff to draft, review and refine all seminar materials, including those presented by LAFPP staff during the pension related benefits section of the seminar.
- 1.3.8 The two seminar workshops for early career and approaching retirement should include up to six hours of instruction plus one hour for lunch (provided by LAFPP for participants and presenters).
- 1.3.9 The hours of instruction for the seminar workshop for members exiting the DROP program will be determined by the proposed syllabus.



2 General Submittal Requirements

2.1 Contract Period

The term of this Contract shall be for a period of three (3) years from the effective date of the final signatures and approval by the LAFPP General Manager, City Attorney, Board of Fire and Police Pension Commissioners and the authorized Contractor.

2.2 Proposal Submittal Requirements

All proposals must be submitted in writing and Proposers shall complete and return all applicable documents including forms, appendices, specifications, drawings, schematic diagrams and any technical and/or illustrative literature. LAFPP may deem a proposal non-responsive if the Proposer fails to provide all required documentation and copies. All proposals must be received by LAFPP by 5:00 PM Pacific Daylight Time (PDT) on Monday, September 27, 2010. No proposal will be accepted by LAFPP after that date and time. Proposals should be mailed or hand-delivered to:

Los Angeles Fire and Police Pensions
Carol Tavares, Pre-Retirement Coordinator
360 East Second St., Suite 400
Los Angeles, CA 90012

Submission of proposals in a manner other than as described in these instructions (e.g., fax, electronic transmission) will not be accepted.

2.3 Content of Proposal

Proposals shall be based only on the material contained in the RFP, amendments, addenda and other materials published by LAFPP relating to this RFP. Proposals submitted in response to this RFP must provide the requested information in the format specified in this section. Adherence to this format will help to ensure a fair and objective analysis of submitted proposals. The requested information is organized into individual sections, which should correspond to individual sections in the submitted proposals. Proposals must respond to each topic in the order presented, and responses should be numbered as stated in subsection 3.1 of this RFP. LAFPP reserves



the right to declare as non-responsive and reject any proposals in which information is requested and is not furnished or when a direct or complete answer is not provided.

Note that responses to questions MUST be specifically answered within the context of the submitted proposal. The LAFPP Evaluation Committee will NOT refer to a designated Web site, brochure or other location for the requested information. Responses that utilize references to external materials as an answer will be considered non-responsive.

Proposals failing to comply with the above requirements may be declared non-responsive and eliminated from further consideration.

2.4 Proposer's Conference

A Proposer's Conference will be held on Wednesday, September 8, 2010, at 10:00 a.m., PDT at the address listed below. Proposers are encouraged to submit questions in advance via e-mail. No questions will be accepted via telephone. Questions will not be accepted after the conclusion of the Proposer's Conference on September 8, 2010.

Los Angeles Fire and Police Pensions
360 East Second St., 8th Floor Boardroom
Los Angeles, CA 90012

E-mail questions to: Carol.Tavares@lafpp.com

2.5 Finalists and Interviews

From the proposals received, the LAFPP evaluation committee may identify a short list of finalists. The finalists may be expected to present their pre-retirement seminar proposal and respond to questions. Proposers are encouraged to take note of the tentative schedule in subsection 2.6 of this RFP for such presentations and plan accordingly.



2.6 Tentative Schedule

This schedule indicates estimated dates for the RFP process. The City reserves the right to adjust this schedule when appropriate.

Date	Event
08/23/2010	Release RFP to Potential Proposers
09/08/2010	10:00 a.m. Proposer's Conference – last day to submit questions at conclusion of the conference.
09/27/2010	RFP Responses Due – must be received by 5:00 p.m. PDT.
09/27/2010	Evaluation Period Begins
11/2010	Staff recommendation to Board to award and execute contract with successful Proposer.



3 Detailed Submittal Requirements

3.1 Proposal Format

Proposers shall prepare their proposals in accordance with the instructions outlined in this section. Each Proposer is required to submit the proposal in a sealed package. Proposals should be prepared as simply as possible and provide a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of the RFP. Utmost attention should be given to accuracy, completeness and clarity of content. All parts, pages, figures and tables should be numbered and clearly labeled. The proposal should be organized into the following major sections:

<u>PROPOSAL SECTION</u>	<u>TITLE</u>
1.0	Letter of Transmittal
2.0	Table of Contents
3.0	Company Information
4.0	Presenter(s) Information
5.0	Proposed Formats & Instructional Materials
6.0	Fee Structure
7.0	Attachments

Instructions relative to each part of the response to this RFP are defined in the remainder of this section. Response information should be limited to pertinent information only.

3.1.1 All proposals must be submitted in writing and Proposers shall complete and return all applicable documents including forms, appendices, drawings, schematic diagrams and any technical and/or illustrative literature. LAFPP may deem a Proposer non-responsive for failure to provide all required documentation and copies.

3.1.2 Number of Copies - Each Proposer shall submit one (1) original (labeled "Master Copy") signed in ink, four (4) copies (labeled "Copy 1", "Copy 2", etc.) of the proposal and one (1) electronic copy in CD media, in Microsoft Word compatible or PDF format. Proposals must include the RFP title and the Proposer's (company) name.



- 3.1.3 Proposers shall not use, copy or replicate, in any form, the City of Los Angeles seal or LAFPP logo.

3.2 Proposal Section 1.0: Letter of Transmittal

Each response shall include a single page Letter of Transmittal on the Proposer's letterhead that identifies the Proposer and the proposal package being submitted.

The Letter of Transmittal must include the legal business name, address, telephone number and business status (individual, limited liability partnership, corporation, etc.) of the Proposer.

The Letter of Transmittal must also include the person(s) authorized to represent the Proposer in negotiations with LAFPP with respect to the RFP and any subsequently awarded contract. Provide the representative's name, title, address, telephone number, e-mail address and any limitation of authority for the person named.

The letter is to be signed by a person(s) authorized to bind the Proposer to all provisions of this RFP, to any subsequent changes and to the contract if an award is made. (If the Proposer is a partnership, the proposal must be signed by a general partner in the name of the partnership. If the Proposer is a corporation, the proposal must be signed on behalf of the corporation by two authorized officers (a Chairman of the Board, President or Vice-President, and a Secretary, Treasurer or Chief Financial Officer), or an officer authorized by the Board of Directors to execute such documents on behalf of the corporation.)

- 3.2.1 Important Exceptions to Contract Documents - The Proposer shall clearly state in the submitted proposal any exceptions to, or deviations from, the minimum proposal requirements, and any exceptions to the terms and conditions of this RFP. Such exceptions or deviations will be considered in evaluating the proposals. Any exceptions should be clearly noted in the Letter of Transmittal. Proposers are cautioned that exceptions taken to this RFP may cause their proposal to be rejected.
- 3.2.2 The Proposer may include any important general information that is deemed significant enough to be highlighted.



3.3 Proposal Section 2.0: Table of Contents

Each proposal must include a Table of Contents listing the sections included in the proposal.

3.4 Proposal Section 3.0: Company Information

3.4.1 Provide a brief description of your company. Include the following:

- (a) Primary business activity
- (b) State all business names
- (c) Identify affiliated companies
- (d) Number of employees
- (e) Years in business
- (f) Business locations
- (g) Client base
- (h) Overview of services and areas of expertise
- (i) Indicate if your firm sells financial products
- (j) Years providing financial planning educational presentations

3.4.2 Have you ever worked with any government pension systems (particularly safety employees) on pre-retirement planning? If so, please list each system, provide dates and supply the details of your work with each. Please supply a name and telephone number of a person with the system who we may contact.

3.4.3 Please provide the names of any other clients with whom you are currently active in presenting similar financial planning education programs. (Include name of client, contact person, address and telephone number.)

3.4.4 What does your company do to stay abreast of all the subject areas relevant to pre-retirement planning?

3.4.5 As stated in Sections 1.3.1 and 1.3.2, we are retaining a company only for the purpose of providing general information in the area of financial planning education. There must be a professional wall between the company hired and the members who attend the seminars. Furthermore, we specifically prohibit sales of any products at the



seminars along with any solicitations or referrals. Are you willing to agree to these restrictions?

3.5 Proposal Section 4.0: Presenter(s) Information

- 3.5.1 What is the professional background of your presenter(s)? Please provide, as part of your proposal, a resume or career summary of the presenter(s).
- 3.5.2 How many years has/have your presenter(s) worked in the area of pre-retirement planning?
- 3.5.3 If your presenter(s) has/have special training in any of the major areas of the seminar (taxes, social security and financial planning), please describe such experience.
- 3.5.4 Provide a response to each of the following questions for each proposed presenter:
- 1) Have you ever been cited by a professional or regulatory governing body for disciplinary reasons?
 - 2) Are you currently engaged in any other investment-related business, either as a sole proprietor, partner, office, employee, trustee, agent or otherwise? If so, explain.
 - 3) How many clients will you be working with concurrent to this contract?

3.6 Proposal Section 5.0: Proposed Formats & Instructional Materials

- 3.6.1 The Contractor will be required to develop and produce two (2) separate manuals – one for early career and another for approaching retirement. These manuals should be specific to the needs of our membership. This manual will become the property of members who attend the seminar. If you were hired, how long would it take to develop these manuals?
- 3.6.2 The Contractor will be required to develop and produce a manual for members of the DROP program. This manual should be specific to the needs of our members exiting DROP, particularly in the areas of tax implications of distributions, rollover decisions, etc. If hired, how long would it take to develop these manuals?



- 3.6.3 Please furnish one (1) sample copy of a seminar workbook/manual (which will be returned upon request) that you use with another client.
- 3.6.4 As part of your seminar, do you provide forms, worksheets or any other materials that are given to members to complete prior to the actual seminar? If so, please provide samples and identify the seminar format it applies to (single copy of each form).
- 3.6.5 How do you review and update your instructional materials and presentation content? How often do you do this?
- 3.6.6 The provision of accurate and up-to-date manual information is of great importance to us. As such, if your company provided the seminar manuals, which included errors, (e.g., wrong version or pages out of order) would you agree to a discount of the price paid for the manuals? What discount or set amount do you propose?
- 3.6.7 Provide a syllabus detailing the content of a financial planning education program you propose to present for: (1) early career and (2) approaching retirement. Please include the reasons for selecting the topics to be discussed and how they will benefit the members addressed.
- 3.6.8 Provide a syllabus detailing the content of financial planning education program you propose to present for members preparing to exit the DROP program. Please include the reasons for selecting the topics to be discussed and how they will benefit the members addressed.
- 3.6.9 Describe your use of computer-technology or other audio-visual instructional materials used in your seminar presentation.

3.7 Proposal Section 6.0: Fee Structure

- 3.7.1 What would be your fee for developing financial planning education seminars program for each format (early career, approaching retirement and DROP) excluding the LAFPP pension benefits portion?
- 3.7.2 Would there be a separate fee for providing workbook/manuals? If so, what is the per unit cost for the workbook/manuals? We provide each member with one workbook. Married couples – except where both persons are system members – receive one workbook.)
- 3.7.3 Is there a fee for updating the workbook/manuals?



- 3.7.4 Is there a cost to LAFPP for the preparation of any audiovisual materials? If so, please state that cost(s).
- 3.7.5 Are you available for telephone consultations with LAFPP regarding any of the seminar subjects? If so, is there a fee for this service? If so, please state fee amount or structure.
- 3.7.6 What is your fee for delivery of instruction and how many hours does this include?
- 3.7.7 Will you require any other miscellaneous fees? If so, specify the fee and amount.
- 3.7.8 As it is currently constituted, LAFPP maintains all member information and carries out the actual administrative aspects of producing these seminars (such as invitations, venue and food arrangements). However, if the tasks of providing the venue and food arrangements (excluding invitations) were given to your company to handle, please answer the following: 1) Could you do this? and 2) What would be your fee?
- 3.7.9 If your standard fee structure – or any part of it – is different than above, or if there are costs not reflected in the questions above, please state those here, citing specific dollar amounts along with the services provided.

3.8 Proposal Section 7.0: Attachments

All proposals MUST include a sample contract or service agreement. In addition, please include the following, as requested in earlier sections of this RFP:

- Sample seminar workbook/manual used for another client.
- Sample pre-seminar materials to be distributed to members.

3.9 Other Information

We will accept, for inspection, submissions of any materials you are currently using with other clients and – on request – will return these items after the selection process is completed. Please label all items you wish to have returned with your company's name and address.



4 Evaluation of Responses

4.1 Evaluation Committee

An evaluation committee will be established to evaluate all proposals. The evaluation committee may request some or all Proposers to demonstrate their proposed program. If a demonstration is desired, Proposers will be notified via e-mail at least three business days in advance to schedule. Demonstrations should be limited to 30 minutes followed by a 30-minute question and answer period. The proposed Presenter should lead the demonstration. Key staff, who would be working on the contract if awarded, should also be present. The use of the City Seal of Los Angeles or the LAFPP logo shall not be used in the presentation material.

4.2 Evaluation Criteria

The evaluation team will recommend award of contract based upon the best combination of price, experience and quality of service delivery. Submitted proposals will be evaluated based on the following factors:

Evaluation Factors
Contractor Qualifications:
Company's past performance on contracts of similar size & scope/Experience serving public pension funds/References
Experience and qualifications of key personnel assigned
Ability to demonstrate strong and engaging presentation skills while delivering serious financial planning information
Quality and Responsiveness of the Proposal:
Company Information
Presenter(s) Information
Proposed Syllabus/Instructional Materials
Proposed Fees – Best Overall Value

LAFPP shall reserve the right to use such other criteria as may be deemed appropriate in evaluating proposals, even if such criteria are not mentioned in the RFP.



5 General Terms and Conditions

5.1 General Conditions

When responding to this RFP, please follow all instructions carefully. Please submit proposal contents according to the outline specified and submit documents according to the instructions. By submitting a proposal, Proposers acknowledge that:

- 5.1.1 LAFPP reserves the right to reject any or all proposals; to waive any minor informality in proposals received; to reject any unapproved alternate proposal(s); and reserves the right to reject the proposal of any Contractor who has previously failed to perform competently in any prior business relationship with LAFPP. The rejection of any or all proposals shall not render LAFPP liable for costs or damages.
- 5.1.2 All proposals shall be firm and final offers, and may not be withdrawn for a period of one hundred twenty (120) days following the announced deadline for the submission of proposals under this RFP. A response to this RFP is an offer to contract with LAFPP based upon the terms, conditions, service level agreement and specifications contained in the proposal submitted.
- 5.1.3 LAFPP shall not be liable for any expenses incurred by any Proposer prior to issuing any contract that may result from this RFP.
- 5.1.4 The Proposer is liable for all errors or omissions incurred by the Proposer in preparing the proposal. The Proposer will not be allowed to alter proposal documents after the due date of the submission.
- 5.1.5 The Proposer shall not change any wording in the RFP or associated documents.
- 5.1.6 This RFP and the proposal, or any part thereof, may be incorporated into and made a part of the final contract between LAFPP and the Contractor.
- 5.1.7 Any term or condition in this RFP notwithstanding, LAFPP reserves the right to negotiate the terms and conditions of any contract resulting from this RFP with the selected Contractor.
- 5.1.8 Withdrawal of Proposal – The Proposer may withdraw submitted



proposal in writing at any time prior to the specified due date and time. Faxed withdrawals will be accepted. A written request, signed by an authorized representative of the company, must be submitted to:

Los Angeles Fire and Police Pensions
Carol Tavares, Pre-Retirement Program Coordinator
360 East Second St., Suite 400
Los Angeles, CA 90012
(213) 978-4450 - fax

After withdrawing a previously submitted proposal, the Proposer may submit another proposal at any time, up to the specified due date and time.

5.2 Standard Provisions

Standard Provisions for City Personal Services Contracts (Rev. 03/09) are provided in Appendix A. Proposers MUST submit responses to these provisions and acknowledge them in any proposal submitted.

All proposals must identify any areas where the Proposer's standard service agreement may be in conflict with the City's indemnification requirements as described in the Standard Provisions for City Personal Services Contracts (Rev. 03/09).

5.3 Conflict of Interest

LAFPP requires that all contractors disclose any existing or potential conflict of interest relative to the performance of services required by any contract resulting from this RFP. Any relationship that may be perceived or represented as an actual or potential conflict of interest must be disclosed. Failure to disclose shall result in immediate termination of any contract resulting from this RFP.

5.4 Bonding, Insurance and Indemnification

The Contractor must maintain, for the duration of any contract resulting from this RFP, insurance coverage as set forth in the Insurance Schedule of the contract form appended to this RFP in Appendix A of the Standard Provisions for City Personal Services Contracts (Rev. 03/09).



The Contractor must certify that it is aware of and will comply with Labor Code 3700 of the State of California requiring every employer to be insured against liability for Workers' Compensation or to undertake self-insurance before commencing any services under the terms of any contract resulting from this RFP.

5.5 Business Tax Registration Certificate (BTRC)

The Contractor understands that the activity described herein constitutes doing business in the City of Los Angeles and it therefore understands that it must register for and pay a business tax pursuant to Section 21.03 of the Los Angeles Municipal Code. The Contractor shall obtain and keep current a Business Tax Registration Certificate Number (BTRC #) and all such certificates required of it and shall not allow any such certificate(s) to be revoked or suspended while any contract is in effect. The Office of Finance administers this program. They are located at City Hall, 200 N. Spring St, Room 101, Los Angeles, CA 90012. Their phone number is (213) 473-5901. Forms and instructions can be accessed via the Internet at <http://www.lacity.org/finance/>.

5.6 Confidential Information/Public Records Law

All responses to the RFP will be kept confidential until such time as recommendation for award of a contract has been announced. Thereafter, proposals are subject to public inspection and disclosure under the California Public Records Act. Proposers must clearly and conspicuously identify all copyrighted material, trade secrets or other proprietary information that the Proposer claims are exempt from the California Public Records Act (CPRA) -- California Government Code Section 6250 et seq.

In the event a Proposer claims that any of its documents are exempt from inspection under the CPRA, the Proposer is required to state in the proposal the following: "The Contractor will indemnify the City and its officers, employees and agents, and hold them harmless from any claim or liability and defend any action brought against them for their refusal to disclose copyrighted material, trade secrets or other proprietary information to any person making a request therefore."

Failure to include such a statement shall constitute a waiver of a Proposer's right to exemption from this disclosure.



5.7 Non-Discrimination

During the term of any contract resulting from this RFP, the Contractor agrees, assures and certifies that, except as permitted by law, the Contractor shall not discriminate on the grounds of race, religious creed, color, national origin, ancestry, age, physical disability, mental disability, medical condition including the medical condition of Acquired Immune Deficiency Syndrome (AIDS) or any condition related thereto, marital status, sex or sexual orientation, the selection or retention of employees and subcontractors and procurement of materials and equipment.

5.8 Disclosure Policy

Proposers must affirm their willingness to comply with LAFPP's Contractor Disclosure Policy, as provided in Appendix B. Failure to certify compliance with this policy shall result in the rejection of the proposal as non-responsive.

5.9 Ownership of Documents

All reports, tables, charts and other contract documents prepared under this RFP by the Proposer shall be and remain the property of LAFPP upon LAFPP compensation of the Contractor for its services as herein provided. Contractor shall not release to others information furnished by LAFPP or any other City agency, Commission or Board without prior written approval from LAFPP.

5.10 Independent Contractor

The selected Contractor shall, at all times during the term of any contract resulting from this RFP, retain its status as an independent contractor. The Contractor's employees shall under no circumstances be considered or held to be employees or agents of either LAFPP or the City of Los Angeles.



6 Appendix

Appendix A – Standard Provisions

A.1 Nondiscrimination/Equal Employment Opportunity/Affirmative Action Program

Appendix B – Contractor Disclosure Policy

Appendix C – Summary of Pension Plan Provisions