



**REQUEST FOR QUALIFICATIONS (RFQ)
FOR
Tabletop Exercise Consulting Services
RFQ NO. 4276**

Release Date:	Monday, April 22, 2024	
Proposal Due Date:	Monday, May 13, 2024 3:00 P.M. PST Electronic submission link All requested documents must be submitted here .	RFQ Administrator: Dan Goto Los Angeles City Employees' Retirement System E-mail: daniel.goto@lacers.org
All questions must be submitted in writing no later than:	Friday, May 3, 2024, 3:00 P.M. PST Submit questions to the RFQ Administrator. Any questions and all answers will be posted on the LACERS website: https://www.lacers.org/rfps-contracting-opportunities	
Official Notices/Addendums:	To ensure that no firm is provided an advantage over another, all requirements are specified in this RFQ. Any changes to the requirements will be posted as an addendum to the RFQ on the LACERS website: https://www.lacers.org/rfps-contracting-opportunities . Proposers are solely responsible for monitoring this website and adhering to RFQ addendums.	
Prohibited Communications:	From the RFQ release date until a contract for these services is fully executed, firms are prohibited from communicating with Board members or staff, other than the RFQ Administrator, concerning this RFQ or the resulting contract. Any communications could be considered attempts to lobby or market services and is therefore prohibited by LACERS' Ethical Contract Compliance Policy. Firms will be disqualified from contract consideration if the prohibition is not honored.	

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I. INTRODUCTION

The Los Angeles City Employees' Retirement System ("LACERS" or the "Plan") is a department of the City of Los Angeles, California, established in 1937 under Article XI of the City Charter. LACERS is under the exclusive management and control of the Board of Administration (the "Board"), which has sole authority for the administration of benefits and investment of the assets of the fund. The Board administers a defined benefit retirement plan and post-employment healthcare plan for approximately 55,000 members, comprised of approximately 27,000 active employees, 8,000 inactive employees, and 20,000 retired Members and beneficiaries of the City of Los Angeles.

Currently, LACERS has a comprehensive Department Emergency Plan (DEP) and Business Continuity Plan (BCP). In order to train and practice the use of these plans, LACERS employs annual Tabletop Exercises with various scenarios. These exercises also identify "gaps" that will allow us to improve the plans. Examples of proposed exercise scenarios include, but are not limited to:

- Cybersecurity
- Active Shooter
- Earthquake
- Civil Unrest

LACERS is seeking to pre-qualify firms with experience in providing tabletop exercise consulting services. LACERS will invite these firms to bid by assigning a task order solicitation or similar request for bids. LACERS reserves the right to contract with any or all pre-qualified firms at the conclusion of this RFQ process, with the expectation that each exercise will be performed according to an individual work order or similar agreement pursuant to the terms of an initial contract awarded at the conclusion of this RFQ process. In the alternative LACERS may opt to award a stand-alone contract for any individual project proposed in response to a task order solicitation or similar process at the conclusion of this RFQ process.

This RFQ details the requirements needed by LACERS and instructs interested firms on the application and selection process. All firms meeting the minimum qualifications outlined in Section II of this RFQ are invited to submit a Statement of Qualifications.

To better fulfill LACERS' needs, more than one firm may be selected as a result of this RFQ. In that case, as specific projects are identified, LACERS would assign the project to the firm best suited to provide the services required for a given project.

II. MINIMUM QUALIFICATIONS

Firms must clearly demonstrate meeting the following minimum qualifications for their responses to be considered.

- Firms must have at least five (5) years of experience conducting Tabletop Exercises to be considered as a qualified candidate for the purposes of this RFQ.
- Firms must fully respond to all questions included in this RFQ and submit responses to the Questionnaire.

III. SCOPE OF SERVICES

LACERS seeks to pre-qualify one or more firms to provide tabletop exercise consulting services under a 3-year agreement. Selected firms will be included on a short list, or “bench,” of pre-qualified consultants. On an as-needed basis, LACERS will identify tabletop exercise scenarios and prepare respective scopes of work. Bids will be requested from firms selected at LACERS’ discretion. The firm with the best fit for the specified scenario will be selected, resulting in a contract to perform the described services.

REQUESTED SERVICES

Firms that are added to LACERS’ list of qualified contractors at the end of the RFQ process must be able to provide the following services including, but not limited to:

- Develop an advanced tabletop exercise
 - Prepare all exercise materials (including documents and A/V materials)
 - Conduct in-person or virtual advanced exercise for staff numbering 10-80 participants
 - Conduct an After-Action meeting with LACERS and recommend next steps based on results of the exercise
- A. Selected firms must be able to fully communicate and display projects electronically for LACERS’ review. Selected firms must supply LACERS with digital copies of all documents required for the exercise.
- B. Contractor services shall include all general duties required by LACERS’ General Conditions and Compliance Documents (Appendix A).
- 1) Maintain confidentiality of any information resulting from this engagement except with written consent from the General Manager of LACERS or designee, prior to the release of any such information. This includes, but is not limited to, press releases, research, reports, and any publicity given to the Contractor for work provided under the resulting contract. LACERS shall be credited as the sponsoring agency.
 - 2) Notify LACERS immediately of any anticipated changes in personnel assigned under the terms of this engagement. The Contractor shall submit resumes of any proposed replacement personnel and obtain written approval from LACERS for any change in the personnel assigned to the work.
 - 3) In accordance with LACERS’ Contractor Disclosure Reporting Policy, notify LACERS staff in writing in the event that any conflict of interest or possible conflict of interest is discovered regarding the provision of services.

Note: Any breach of the Confidentiality & Non-Disclosure of Member Information Policy (Attachment 1) is subject to cancellation of contract and the contractor liability for damages.

IV. CONTENT OF RESPONSE

To be considered responsive to the RFQ, proposers must provide responses to the information requested below. Proposers are encouraged to submit a practical and sustainable proposal. The proposal is requested in the following order, to be tabbed accordingly:

A. INTRODUCTION

A. **Title Page** - The title page must clearly state "Request for Qualifications – Tabletop Exercise Consulting Services" along with proposer's name, address, and contact information.

B. **Table of Contents**

C. **Cover Letter**

1) The cover letter shall include the following statement:

This proposal is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal, and the proposer has not in any manner sought by collusion to secure for themselves an advantage over any other proposer.

2) The proposer's legal business name, address, telephone number, website URL, and business type (i.e., sole-proprietorship, limited liability partnership, corporation, etc.).

3) The person or persons authorized to represent the proposer in negotiations with LACERS with respect to the RFQ and any subsequently awarded contract. Provide the representative's name, title, address, telephone number, e-mail address, and any limitations of authority.

4) If the proposal includes any alternatives/conditions to requirements detailed within the RFQ, include an explanation of the alternatives offered/conditions. LACERS reserves the right to reject proposals where the alternative/conditions are not acceptable.

5) The cover letter is to be signed by a person or persons authorized to bind the proposer to all provisions of the RFQ, any subsequent changes to the RFQ, and to the contract if an award is made. For partnerships, the response must be signed by a general partner. For corporations, the response must be signed by two authorized officers or designees.

B. QUALIFICATIONS AND EXPERIENCE

Please provide thorough responses immediately after each question. If attachments are provided in response to a question, indicate in the answer the specific tab and/or pages that respond to the question.

- 1) Provide a brief introduction of your firm's history, including year it was founded, general description of products and services offered, the firm's primary business activity, and clients served. Additionally, identify affiliated companies of the firm and what differentiates you from your competition.
- 2) Identify the licenses, credentials/designations, affiliations, special knowledge, qualifications, expertise or awards held by your firm and its key managers. Briefly describe how this translates to qualifications to provide the requested services.
- 3) References
 - a. Provide a list of clients in the last five years. Include the scope of work, dates of contract, contract amount, contact person, and telephone number.
 - b. Provide a list of all other current clients. Include name of client, contact person, address and telephone number.
- 4) Sample Work

Sample work is required for each service of expertise that your firm wishes to be considered for in this RFQ. For example, if you wish to be considered for tabletop exercise consulting services, you must submit (3) samples of scenario proposals.

General Questions about the Firm

- 5) Provide a list of all the major services provided by your firm even if they are not specific to the scope of services being requested by this RFQ.
- 6) Provide links to your firm's social media presence (i.e. Facebook, Twitter, Instagram, etc.) and samples of social media support you have provided to previous or current clients, if applicable.
- 7) Provide an organizational chart indicating roles of all individuals expected to be involved in providing requested services and curriculum vitae/biography for each team member, including the hourly rates proposed to be charged to LACERS for each team member. What experience does the team have working together?
- 8) Are ownership changes planned or anticipated at this time?
- 9) Describe the turnover in key professional personnel in the last five years. Do you anticipate that any of the team members proposed to work with LACERS will leave the firm in the next five years?
- 10) What incentives are provided to attract and retain top quality employees at your firm?
- 11) What skills, qualities, and experiences do you look for in hiring employees?
- 12) Disclose the nature of any past, present, or pending relationship with any LACERS Board Member, consultant, or staff. How have you reviewed this potential engagement for conflict of interest? Were there any conflicts, potential conflicts, or other issues that could raise a reasonable appearance of a conflict of interest?

- 13) Indicate your experience with major disruption(s) of your business and how they impacted your clients. Please provide a copy of your Business Continuity Plan (BCP). If you do not have a formal BCP, indicate what contingencies your firm has made to address potential disruptions to client services in the event of a natural or man-made disaster, or pandemic.

Questions Concerning Your Statement of Qualifications

- 14) Is your firm requesting any alternatives and/or substitutions to the LACERS standard RFQ and contracting provisions? See General Conditions (Appendix A) and the Standard Provisions for City Contracts (Appendix B). LACERS reserves the right to determine if the alternatives/substitutions are acceptable.
- 15) Does your firm have a sexual harassment policy? Please describe the policy and summarize any pending or anticipated litigation against the firm, its employees, or partners, involving allegations of sexual harassment or sexual misconduct (Attachment 7).
- 16) Is your firm certified by a governmental entity as a Women-Owned Business, Minority-Owned Business, or Other Business Entity? If yes, please attach a copy of your certification.

C. PROPOSED FEE SCHEDULE

Provide a fee schedule, with full breakdown of costs associated with all tabletop exercise consulting services. Once a firm has been selected, negotiations of the fee(s) may become necessary. In no case will the negotiations result in a fee that is higher than the fee contained in the proposal.

- 1) Provide a fee schedule, with full breakdown of costs associated with each exercise development.
- 2) The prices proposed within the submission must remain valid from the date of the submission through the end of the contract and must include any/all costs expected to be paid by LACERS.
- 3) Provide a schedule of incidental fees that are commonly charged in your industry (delivery fees, materials storage, etc.).

V. PROPOSAL SUBMISSION & EVALUATION

A. PROPOSAL SUBMISSION INSTRUCTIONS

- 1) The deadline for submission and the location for submission are located on the cover sheet of this RFQ.
- 2) **Response must be submitted via Electronic Submission** – The complete proposal package shall be clearly labeled with the name of the firm, and “2024 Tabletop Exercise Consulting Services RFQ.”

- a. Please provide one copy of your entire proposal in PDF format, inclusive of any work samples, exhibits, and other required forms, with file naming format: "LACERS 2024 Tabletop Exercise Consulting Services RFQ."
 - b. Submit your proposal through this [upload portal](#).
- 3) **If your proposal contains any trade secrets or other proprietary, confidential information that the proposer claims is exempt from disclosure under the California Public Records Act, then you must submit separately one (1) redacted copy of the proposal in addition to the original version.**

Note: Proposers selected to make presentations to the Board/Committee may be required to submit 10 additional hard copies of their responses.

- 4) Late proposals will not be considered for review. LACERS reserves the right to determine the timelines of all proposals submitted. At the day and time appointed, all timely submitted proposals will be opened and the name of the proposers announced. No other information about the proposals will be made public until such time as a recommendation concerning proposals is made to the Board.
- 5) All contact regarding this RFQ or any matter relating to it must be in writing and should be emailed to the administrator listed on the cover page.
- 6) If only one submission is received in response to this solicitation, LACERS reserves the right to classify this procurement as a failed bid competition and either initiate a new bid solicitation or enter into a sole source agreement with the sole respondent.
- 7) LACERS reserves the right to select more than one party to provide these services.

B. EVALUATION OF PROPOSALS

- 1) The selected proposer must successfully pass all the following levels of review:

- a. **Level I – Administrative Responsiveness**

LACERS will conduct a preliminary evaluation of all proposals submitted by the deadline to determine compliance with proposal requirements and mandatory document submissions. Firm's proposal must demonstrate its responsiveness to the administrative requirements outlined in the RFQ. Firm's ability to adhere to LACERS' standard contract provisions will also be considered (see General Conditions (Appendix A) and the Standard Provisions for City Contracts (Appendix B)).

- b. **Level II – Review of Qualifications, Experience, & References**

Proposer must demonstrate it meets the minimum qualifications and must demonstrate a positive record as a responsible contractor through due diligence reviews conducted by LACERS.

- c. **Level III – Proposed Services**

d. Level III – Final Approval by the Board

The proposer or proposers determined to be the most qualified to provide the required services at the best overall value to LACERS, as determined by the evaluation panel, will be recommended for contract award to the LACERS Board of Administration (Board). The Board, at its sole discretion, makes the final award determination.

EVALUATION CRITERIA	POSSIBLE WEIGHT
<p>Professionalism</p> <p>Proposer demonstrated professionalism in the response to the RFQ, such as: RFQ presentation, well-written summary of the important features of the RFQ, etc.</p>	20
<p>Proposed Scope of Services Description and Methodology</p> <p>Firm demonstrates strong understanding of services needed by LACERS. Firm meets all service requirements for tabletop exercise development, execution, and post-exercise evaluation.</p>	40
<p>Qualifications, Experience, and Accomplishments</p> <p>Demonstration of expertise in tabletop exercise consulting services based on sample work provided in content of response to this RFQ; demonstration of being able to meet deadlines and turn around projects within an agreed upon time frame including rushed deadlines; strength of favorable references during reference verification process.</p>	40
TOTAL POINTS	100

2) Tentative Schedule

This schedule indicates estimated dates for the RFQ process. LACERS reserves the right to adjust this schedule when appropriate.

Date	Event
04/22/2024	Release of RFQ
05/03/2024	Deadline for RFQ questions
05/08/2024	RFQ question responses posted
05/13/2024	Deadline for proposal submissions

VI. GENERAL CONDITIONS AND COMPLIANCE DOCUMENTS

Proposers are to submit required documents specified in the General Conditions and Compliance Documents (Appendix A). The General Conditions also indicate several standard contracting provisions and requirements of every LACERS and City of Los Angeles contract. Read the documents thoroughly as they may result in additional expense to your firm, such as certain insurance requirements and a Los Angeles Business Tax Registration Certificate. This RFQ is for a new contract. Previous submissions and/or waivers may not apply. New forms must be completed and processed.

VII. EXECUTIVE DIRECTIVE 35

Respondents are advised, pursuant to the Mayor's Executive Directive 35, if a bidder is selected and awarded a contract, and if the contractor is a for-profit company or corporation, the contractor is expected to, within 30 days of the effective date of the contract and on an annual basis thereafter (i.e., within 30 days of the anniversary of the effective date of the contract), report the following demographic information to the City via the Regional Alliance Marketplace for Procurement (RAMP): contractor's and any subcontractor's annual revenue, number of employees, location, industry, race/ethnicity, and gender of majority owner ("contractor/subcontractor Information"). On an annual basis, the contractor shall further request that any subcontractor input or update its business profile, including the contractor/subcontractor information, on RAMP or via another method prescribed by City.

Disclosure of demographic information is strictly for informational purposes and will not have any impact on the bidding, selection, or awarding process of a contract.