



JOSEPH KELLY
TREASURER AND TAX COLLECTOR

COUNTY OF LOS ANGELES TREASURER AND TAX COLLECTOR

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February 3, 2017

SENT VIA EMAIL

Dear Interested Party:

REQUEST FOR STATEMENT OF QUALIFICATIONS FOR MORTUARY SERVICES ADDENDUM ONE

This letter constitutes a written addendum to the Mortuary Services Request for Statement of Qualifications (RFSQ) and provides you with updated information related to the RFSQ. Please note the following:

1. In the RFSQ, Paragraph 2.7, Preparation and Format of the SOQ, shall be replaced in its entirety with the revised Paragraph 2.7, Preparation and Format of the SOQ, to reflect the updated content and sequence list, as Attachment I to this Addendum One.
2. In the RFSQ, Paragraph 2.7.3, Establishment/Vendor's Qualifications, shall be replaced in its entirety with the revised Paragraph 2.7.3, Establishment/Vendor's Qualifications, to reflect the updated submission requirements, as Attachment I to this Addendum One.
3. In the RFSQ, Paragraph 2.7.8, Financial Capacity, shall be added to reflect the inclusion of the financial capacity requirement, as Attachment I to this Addendum One.
4. In the RFSQ, Paragraph 2.9, Acceptance of Terms and Conditions of Master Agreement, shall be replaced in its entirety with the revised Paragraph 2.9, Acceptance of Terms and Conditions of Master Agreement, to reflect the updated acceptance of terms and conditions, as Attachment I to this Addendum One.

Interested Party
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Should you have any questions, you may contact Kathy Gomez, Administrative Services Manager I, of my staff at (213) 974-7360 or contracts@ttc.lacounty.gov.

Very truly yours,

JOSEPH KELLY
Treasurer and Tax Collector



Elena Villacrés Torres
Administrative Services Manager III

EVT:KAG:ae

Mort RFSQ 2017_Adden 1_Gen Req 2-3-17 kag

Attachment

**MORTUARY SERVICES
REQUEST FOR STATEMENT OF QUALIFICATIONS
ADDENDUM ONE**

2.7 Preparation and Format of the SOQ

All SOQs must be bound and submitted in the prescribed format. Any SOQ that deviates from this format may be rejected without review at the County's sole discretion.

All SOQ's must be typed on 8½" x 11" white bond paper, bound and submitted in the prescribed format. Section tabs are not required but may be included to improve readability. The original SOQ and each copy shall be individually bound in a secure manner with a protective covering that allows for easy removal of documents marked proprietary or confidential. The SOQ's are to be made based on the contents of this RFSQ and according to the format indicated in this Section 2.7. The County shall assume no responsibility for any misunderstanding or representations concerning information provided, or conditions given, by any of its employees prior to the execution of a Master Agreement unless it is included in the RFSQ or in an addendum to the RFSQ.

In preparing the written SOQ, the Establishment/Vendor should do so in its own words and not copy the language in the RFSQ. The Establishment/Vendor should ensure that the SOQ responds completely and thoroughly to all of the requirements set forth in this RFSQ. The objective of the SOQ submission is for the TTC to ascertain the Establishment/Vendor's ability to provide or exceed the required services. In addition, specific information is requested from all Establishments/Vendors to ensure that the SOQ's can be fairly compared and evaluated in a standard manner. Only that information which is contained in the SOQ will be evaluated.

The content and sequence of the SOQ must be as follows:

- Transmittal Letter
- Table of Contents
- Establishment/Vendor's Qualifications (Section A)
- Required Forms (Section B)
- Proof of Insurability (Section C)
- Proof of Licenses (Section D)
- Quality Control Plan (Section E)
- **Financial Capacity (Section F)**

2.7.3 Establishment/Vendor's Qualifications (Section A)

Demonstrate that the Establishment/Vendor's organization has the experience to perform the required services. The following sections must be included:

A. Establishment/Vendor's Background and Experience (Section A.1)

The Establishment/Vendor shall complete, sign, and date the Establishment/Vendor's Organization Questionnaire/Affidavit – Exhibit 1A as set forth in Appendix A. **The person signing the form must be authorized to sign on behalf of the Establishment/Vendor and to bind the Establishment/Vendor in a Master Agreement.** Provide a summary of relevant background information to demonstrate that the Establishment/Vendor meets the minimum qualifications stated in Section 1.4 of this RFSQ and has the capability to perform the required services as a corporation or other entity. In addition to the summary, complete and submit Exhibit 1B, Project Staff Background, with the firm's proposal.

1. Establishment/Vendor must provide evidence that it has been in business for at least three years providing the required services equivalent or similar to the services identified in Appendix I: SOW.

In the event the firm itself does not have the requisite three years, but one or more of the principals involved in managing the daily operation of the firm individually do, then their individual or collective experience performing services equivalent or similar to the required services identified in Appendix I: SOW, may be considered in meeting this requirement in the County's sole discretion. Establishments/Vendor must provide a written detailed description and/or resume demonstrating its Principal's three years of experience to fulfill this requirement.

2. Establishment/Vendor must have an administrative business office located within the County or within a county contiguous to the County with a responsible person(s) to maintain all required records specified in this RFSQ. **The Establishment/Vendor must provide the address of its business office in its SOQ.**
3. Establishment/Vendor must provide evidence of having at least one Mortuary business location within the borders of the County of Los Angeles to perform Mortuary Services.
4. Establishment/Vendor must provide evidence of having a valid funeral establishment license issued by the CF Bureau for each location within the County.

5. Establishment/Vendor must provide evidence of financial stability sufficient to maintain a Mortuary business (e.g., by providing evidence it has been an going concern for more than three years; or has branched off from an going concern which operated for more than three years; or is taking over for a former going concern which has operated for more than three years; or has a strong cash flow on its financial statements; or has substantial cash reserves in its bank account).
6. Establishment/Vendor must provide evidence that one employee or owner possesses a valid funeral director license issued by the CF Bureau.
7. Funeral Director and other persons who have contact with the PA and the public shall be able to effectively communicate in English both orally and in writing.
8. Establishment/Vendor's proposed Contract Manager and Alternate Contract Manager must have a minimum of three years of documented experience in providing the required services equivalent or similar to the services identified in Appendix I: SOW, either with the Establishment/Vendor or with another firm. The Establishment/Vendor must provide a written detailed description and/or resume demonstrating the Contract Manager and the Alternate Contract Manager's three years of experience to fulfill this requirement and submit this documentation with its SOQ Submission.
9. Establishment/Vendor's proposed staff member(s) for the Master Agreement must have at least three years of documented experience in providing the required services equivalent or similar to the services identified in Appendix I: SOW, either with the Establishment/Vendor or with another firm. The Establishment/Vendor must provide a written detailed description and/or resume demonstrating the Establishment/Vendor's proposed staff members' three years' experience to fulfill this requirement and submit this documentation with their SOQ.
10. Establishment/Vendor must provide evidence of employing at least one full-time funeral director licensed by the CF Bureau for each location or as allowed by the CF Bureau. If a full-time director is not provided for each location, documentation from the CF Bureau is required.
11. Establishment/Vendor must provide evidence of employing or having reasonable access to at least one embalmer with a valid embalmer license issued by the CF Bureau.

12. As appropriate, Establishment/Vendor must provide evidence of a valid embalmer apprentice license issued by the CF Bureau.
13. Establishment/Vendor must provide a listing of subcontractors, if any, and the goods/services the subcontractor(s) will provide.
14. Establishment/Vendor must provide an Organizational Chart listing the names and positions of each administrative and/or management staff as well as all professional staff, including staff licensed by the CF Bureau.
15. Establishment/Vendor must be found to be Responsive and Responsible, such finding to include but not be limited to the timely scheduling and complete fulfillment of agreed mortuarial and funerary services, provision of quality care in the treatment of decedent remains, and financial integrity in the conduct of the Establishment/Vendor's business affairs (e.g., by providing evidence of contractual relationships with cemeteries spanning a period of three or more years; no complaints on record with the Department of Consumer Affairs covering the past three years; has a business facility where funerary services can be held). **The Establishment/Vendor must provide a written statement attesting to its ability to meet this requirement in its SOQ.**

Based on the structure of the Establishment/Vendor's organization, the Establishment/Vendor shall submit the required documents below. If the Establishment/Vendor's organization does not fit into one of these categories, upon receipt of the SOQ or at some later time, the County may, in its discretion, request additional documentation regarding the Establishment/Vendor's business organization and authority of individuals to sign Contracts.

If the below referenced documents are not available at the time of SOQ submission, Establishments/Vendors must request the appropriate documents from the California Secretary of State and provide a statement on the status of the request.

Required Support Documents:

Corporations or Limited Liability Company (LLC):

The Establishment/Vendor must submit the following documentation with the SOQ:

- 1) A copy of a "Certificate of Good Standing" with the state of incorporation/organization.

- 2) A conformed copy of the most recent "Statement of Information" as filed with the California Secretary of State listing corporate officers or members and managers.

Limited Partnership:

The Establishment/Vendor must submit a conformed copy of the Certificate of Limited Partnership or Application for Registration of Foreign Limited Partnership as filed with the California Secretary of State, and any amendments.

B. Establishment/Vendor's References (Section A.2)

It is the Establishment/Vendor's sole responsibility to ensure that the firm's name, and point of contact's name, title and phone number for each reference is accurate. The same references may be listed on both forms – Exhibits 6 and 7.

County may disqualify an Establishment/Vendor if:

- References fail to substantiate Establishment/Vendor's description of the services provided; or
- References fail to support that Establishment/Vendor has a continuing pattern of providing capable, productive and skilled personnel, or
- The Department is unable to reach the point of contact with reasonable effort. It is the Establishment/Vendor's responsibility to inform the point of contact of normal working hours.

The Establishment/Vendor must complete and include Required Forms, Exhibits 6, 7, and 8 as set forth in Appendix A.

- Prospective Contractor References, Exhibit 6:
Establishment/Vendor must provide three references where the same or similar scope of services were provided. **References for existing or terminated contracts and/or subcontracts with the TTC will not be accepted to meet this requirement.**
- Prospective Contractor List of Contracts, Exhibit 7:
The listing must include all Public Entities contracts for the last three years. A photocopy of this form should be used if necessary.

- Prospective Contractor List of Terminated Contracts, Exhibit 8: Listing must include contracts terminated within the past three years with a reason for termination.

C. Establishment/Vendor's Pending Litigation and Judgments (Section A.3)

Identify by name, case and court jurisdiction any pending litigation in which Establishment/Vendor is involved, enforcement actions by regulators (resulting in fines), or judgments against Establishment/Vendor in the past five years. Provide a statement describing the size and scope of any pending or threatening litigation against the Establishment/Vendor or principals of the Establishment/Vendor.

2.7.8 Financial Capacity (Section F)

Provide copies of the company's most current and prior two years (for example 2015, 2014, and 2013) audited financial statements. If audited financial statements are not available, a statement must be provided as to the reason audited statements are not available. Statements should include the company's assets, liabilities, and net worth. At a minimum, include the Balance Sheet (Statement of Financial Positions), Income Statement (Statement of Operations), and the Retained Earnings Statement. If audited statements are available, these should be submitted to meet this requirement. Do not submit Income Tax Returns to meet this requirement. Audited financial statements will be kept confidential, if so stamped on each page.

2.9 Acceptance of Terms and Conditions of Master Agreement

Establishments/Vendors understand and agree that submission of the SOQ constitutes acknowledgement and acceptance of, and a willingness to comply with, all terms and conditions of the Appendix H, Master Agreement. The terms and conditions of Appendix H, Master Agreement, of this RFSQ are not negotiable.