

Exhibit C

CDS

City Data Services, LLC



RFP PROPOSAL

#10649

HOUSING DATA MANAGEMENT FOR COUNTY OF MONTEREY

**Date: March 2, 2018
3 PM**

Brisbane, CA

www.citydataservices.net * www.citydataservices.com

415.572.4572 * 650.533.5933



City Data Services, LLC

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City Data Services, LLC

*Section 1: Cover Letter, Signature Page,
Addenda & Table of Contents*



City Data Services, LLC

COUNTY OF MONTEREY
CONTRACTS/PURCHASING OFFICE
1488 SCHILLING PLACE
SALINAS, CA 93901

March 2018

Re: Monterey County Affordable Housing Data Management Services
RFP #10649

To Whom It May Concern,

City Data Services, LLC was formed in 2007, and since has provided cost-effective, data management services to government and the private sector. The partners at CDS, Christina Davidson and Steve Crounse, will build and manage the County's system, we have many years' experience in government service, and software development; designing robust, intuitive data management systems that are easy to use. Resumes are included.

CDS is in the business of providing internet solutions to organizations just like Monterey County; systems that make day to day operations easier without a lot of training or technical expertise required. Our customers are predominantly government entities, city and county employees, that require web-based solutions for managing their complex data management needs. At City Data Services, more than any other company, we work with you, as much as you want us to. We are responsive partners; we listen to your needs, understand your challenges and deliver the solutions you require and we do not charge you for every phone call – our maintenance program covers all services. We make customer service our first priority, and our response time to questions or issues is measured in hours, not days or weeks. This is what we do, and we do it very well.

Our web portal is a certified secured site (identified by the lock symbol on the url) and hosted/backed up on cloud based, third party servers, (the same that Wall Street utilizes). Unique user names and passwords are generated for all users. In eleven years, we have not had any down time and no data breaches. In addition, we have no violations, corrective action notices, enforcement actions or orders, warning notices, writings, or any other forms of industry violations/non-compliance documentation, or any current or previously owned business organizations, from any public agency during 2005 up to and including the present day.

Please find enclosed our proposal to develop and support a system to manage all aspects of Monterey County's multi-family and single family housing. This proposal includes development of your system, (with housing data as described in RFP #10649, Section 5, 5.3.1.1, supplied to CDS by County Staff), in thirty days and ongoing maintenance; including updates, enhancements and improvements for a period of five years for a total cost of \$113,000. The cost covers everything and anything you need including all trainings, meetings or required reporting to the public, any funders and/or County Officials. Also, paper used in this proposal is printed on 100% recycled paper.

Respectfully submitted,

Christina Davidson, Partner
City Data Services

SIGNATURE PAGE

COUNTY OF MONTEREY
CONTRACTS/PURCHASING DIVISION

RFP #10649
ISSUE DATE: **Thursday January 25, 2018**



RFP TITLE: **Affordable Housing Data Management Services**

PROPOSALS ARE DUE IN THE OFFICE OF THE CONTRACTS/PURCHASING
OFFICER BY

3:00 P.M., LOCAL TIME, ON Friday March 2nd, 2018

MAILING ADDRESS:
COUNTY OF MONTEREY

CONTRACTS/PURCHASING OFFICE
1488 SCHILLING PLACE
SALINAS, CA 93901

QUESTIONS ABOUT THIS RFP SHALL BE DIRECTED TO
Jaime Ayala, EMAIL AyalaJ@CO.MONTEREY.CA.US, (831) 783-7047

CONTRACTOR MUST INCLUDE THE FOLLOWING IN EACH PROPOSAL (1 original plus 3 copies):

ALL REQUIRED CONTENT AS DEFINED PER SECTION 7.1 HEREIN

This Signature Page must be included with your submittal in order to validate your proposal.
Proposals submitted without this page will be deemed non-responsive.

CHECK HERE IF YOU HAVE ANY EXCEPTIONS TO THIS SOLICITATION.

CONTRACTOR MUST COMPLETE THE FOLLOWING TO VALIDATE PROPOSAL

I hereby agree to furnish the articles and/or services stipulated in my proposal at the price quoted, subject to the instructions and conditions in the Request for Proposal package. I further attest that I am an official officer representing my firm and authorized with signatory authority to present this proposal package.

Company Name: City Data Services, LLC

Date February 28, 2018

Signature: 

Printed Name: Christina Davidson

Street Address: 403 Alvarado Street

City: Brisbane State: CA Zip: 94005

Phone: (415) 572-4572 Fax: NA Email: citydataservices@yahoo.com

License No. (If applicable): NA

License Classification (If applicable): NA

MONTEREY COUNTY

Administrative Office
Contracts/Purchasing Division



DATE: February 15, 2018

PROJECT: RFP 10649 Affordable Housing Data Management Services

ADDENDUM #1

TO: All Interested Proposers

SUBJECT: Proposal due date extended


Please see attached document for changes to Section 3.0, Calendar of Events. The proposal due date has been extended and is reflected within Section 3.0, Calendar of Events.

A signed copy of this addendum must be submitted along with your original bid proposal package to verify receipt of this Addendum #1.

Jaime Ayala
Deputy Purchasing Agent



Company Representative



Date

Please note the following changes to Section 3.0, Calendar of Events as highlighted below.

3.0 CALENDAR OF EVENTS

- | | | |
|-----|-------------------------------------|--|
| 3.1 | Issue RFP | Thursday, January 25, 2018 |
| 3.2 | Deadline for Written Questions | 3:00 p.m., PST Tuesday February 13, 2018 |
| 3.3 | Proposal Submittal Deadline | 3:00 p.m., PST, Friday, March 2 nd , 2018 |
| 3.4 | Estimated Notification of Selection | March 2018 |
| 3.5 | Estimated AGREEMENT Date | May 2018 |

This schedule is subject to change as necessary.

- 3.6 **FUTURE ADDENDA:** CONTRACTORS, who received notification of this solicitation by means other than through a County of Monterey mailing, shall contact the person designated in the COUNTY POINTS OF CONTACT herein to request to be added to the mailing list. Inclusion on the mailing list is the only way to ensure timely notification of any addenda and/or information that may be issued prior to the solicitation submittal date. **IT IS THE CONTRACTORS' SOLE RESPONSIBILITY TO ENSURE THAT THEY RECEIVE ANY AND ALL ADDENDA FOR THIS RFP** by either informing the County of their mailing information or by regularly checking the County's Solicitation Center web page at www.co.monterey.ca.us/admin/solicitcenter.htm. Addenda will be posted on the website the day they are released.



ADDENDUM

COUNTY OF MONTEREY
CONTRACTS/PURCHASING DEPARTMENT

Date: Thursday February 21, 2018

To: All Contractors Submitting Proposal Packages for RFP #10649 TO PROVIDE AFFORDABLE HOUSING DATA
MANAGEMENT SERVICES.

From: Tom Skinner, Management Analyst II

Subject: Addendum No. 2

This addendum consists of QUESTIONS/WRITTEN RESPONSES for RFP #10649 TO PROVIDE AFFORDABLE
HOUSING DATA MANAGEMENT SERVICES.

Please see attached departmental answers to all questions received by the deadline to submit written questions of February
12, 2018

- This acknowledgement signature page of Addendum No. #2 must be submitted with your proposal package.
- If this acknowledgement signature page is not submitted with your proposal package, your entire proposal package may be considered non-responsive.

RECEIPT IS HEREBY ACKNOWLEDGED OF ADDENDUM NO. 2, RFP #10649

Chad
Authorized Company Signature

Christina Davidson
Printed Name

Feb 28, 2018
Date

Company Name Amec Foster Wheeler		Date 02/12/2018
Question		County of Monterey Response
1	<ol style="list-style-type: none"> 1. Is there a legacy data management system that is being replaced? If so, what is the legacy system? Is it a web-application or desktop application? 2. Would the county consider a custom-built software solution, or does the county require off-the-shelf software? 3. Does the county intend to host the new system on county servers, or does the county wish for the vendor to host it. <ol style="list-style-type: none"> a. If the county intends to host the new system, can the county's environment support an enterprise web-application developed for Windows Server, Microsoft SQL Server, and .NET v4+? 4. What is the approximate size on disk of all existing data (including documents, reports, and other attachments) 5. Approximately how many users will access the new system? 6. Will the new system's users be all internal to the county's organization, or will there be a mixture of internal and external users 7. Will the new system or any parts of it need to be publicly accessible over the world wide web, or will it be primarily an intranet application? 8. Will the new system have mobile users and therefore need to be responsive/adaptive for mobile devices? 	<ol style="list-style-type: none"> 1. No, there is no legacy system. The County does have a mix of Access and Excel formatted resources currently in use. 2. The County may consider a custom-built solution however, every effort must be done to ensure that the data can be transferred easily to a new system. 3. The County does not currently host nor does it intend to host on county servers. 4. Data set is around a gigabyte but most documents have not been digitized yet. 5. Three or four County staff with the possibility to add more in the future. 6. All transactions from initial income qualification through on-going monitoring will be done by a mix of homeowners, renters and County staff. 7. As previously address all transactions from initial income qualification through on-going monitoring will be done by a mix of homeowners, renters and County staff, therefore there will be both external and internal county access. 8. Ideally the County would prefer a system which could be accessed on mobile devices and used when County staff monitors developments in the field.

Company Name	City Data Services	Date 02/12/2018
	Question	County of Monterey Response
3	<p>1. 7: PROPOSAL, PACKAGE REQUIREMENTS Section 4 - Technical Aspects:</p> <p>The term "turn-key" refers to a construction project with a tangible asset, in the software industry, we are service providers. We request that the project is described as such.</p> <p>2. 7: PROPOSAL, PACKAGE REQUIREMENTS Section 9. Bonds:</p> <p>Again, this is not a physical construction project, in the software industry, we do not bond projects, however, at CDS, we provide cyber liability insurance in the amount of \$2 million, per incident and \$2 million aggregate. Recently, cyber liability has become the standard in software agreements, at CDS we go beyond the minimum of \$1 million/incident, \$1 million aggregate and provide double those minimums. We have been providing comprehensive systems to most of the CA Bay Area counties and cities since 2008 and provide excellent software without problems.</p> <p>Please review this and let us know if this will be amended to reflect these software professional practices.</p>	<p>1. That is correct, the term "turn-key" would not apply in this respect. What the county expects is that with minimal work, the selected vendor should be able to customize a system to meet our specific needs the system will be ready within 45-days of signing a contract.</p> <p>2. The following language is what is specifically for software providers.</p> <p>IP Indemnity</p> <p>a) Contractor shall not provide County with any product or design that violates or infringes any registered United States patent, copyright, trade secret or other intellectual property right.</p> <p>b) Contractor warrants that it has the right to license and or distribute to County for County's use while the County contracts with CDS, all software associated with this Agreement including but not limited to, operating software and compliance software.</p> <p>c) If County promptly notifies Contractor in writing of any third party claim against County that any software or other item provided to County by Contractor infringes any patent, copyright, trade secret or other intellectual property right of any third party, Contractor shall immediately indemnify, defend and hold harmless Purchaser against such claims, including attorney's fees and damages actually incurred by the County in connection therewith.</p> <p>d) If any software or other item is, or in the Contractor's reasonable opinion is likely to be held to be infringing, Contractor shall at its sole expense and option: (a) procure the right for County to continue using it; or (b) replace or modify it so that it becomes non-infringing while giving equivalent performance.</p>

Company Name Housing and Development Services, Inc		Date 02/12/2018
Question		County of Monterey Response
2	<ol style="list-style-type: none"> 1. Pg. 6- Scope of Work talks about the need for notifications, documents, forms but is the agency looking for the functionality that accompanies this data? For example, under Document Preparation 5.31 talks about the ability to populate all documents which are necessary to transfer SF units between owners, this would translate to Loan Assumption in Single Family Management application. When working with forms the form is mapped to fields in the database. 2. With relation to Single Family, is the agency looking to originate the loan? The requirements focus primarily on forms, reports, etc. but it's not very clear on what functionality they need to perform in the application(s). 3. 5.4 Monitoring Management & 5.7.2 "...historical monitoring compliance..." Please provide the detail activities and requirements to be reported on. 4. The RFP does not mention conversions or migrations from current system. Does the County currently track everything manually? Are there any systems that could possibly require a data migration into the selected system? 5. The same questions apply for interfaces. Will the County have a need for interfacing into an existing system. For example, will the request for disbursement process require interfacing into an existing County accounting system? 6. What is the expectation on fully implementing the new system? 	<ol style="list-style-type: none"> 1. County documents would include: <ol style="list-style-type: none"> a. Buyer's Occupancy and Resale Restrictions & Amendments b. Subordination Agreements c. Deeds of Trust d. Request for Notice e. Promissory Note f. Loan Agreement We would like the ability to analyze data such as transaction history, locations, etc. 2. The County originates a very small number of down payment assistance loans. In this case, The County would be looking for a place to house documents such as HOME Project Set-Up Reports and Loan Committee packages associated with a specific unit or development. 3. The County monitors annually <ol style="list-style-type: none"> a. Owner-occupied units must provide a self-certification that they are residing in the unit, documented by utility bill in their name showing the service address, and current insurance. Currently The County does not have the ability to track whether or not there are households with persistent non-compliance related to monitoring. b. Rental unit managers need to document that they have not had any turn-over since the last household was income qualified. 4. The County tracks everything manually in multiple Access and Excel files which may or may not contain consistent data. The County is compiling an updated Excel workbook that should be available to migrate basic data into the selected system. 5. No. 6. The expectation is to have a single repository for all the data that is currently stored in multiple Access and Excel files to enhance data reliability and allow county staff to quickly respond to requests for information on individual units and program performance.

- | | | |
|--|--|--|
| | | <p>e) If Contractor is initially unable to perform either option (a) or (b) for a period not to exceed 30 days, Contractor may require County to stop using the potentially infringing system or portion thereof, until Contractor can perform either option (a) or (b), providing however Contractor Supplies County with an alternate means by which County may continue its operations pursuant to this Agreement.</p> <p>Computer Data and Software Confidentiality</p> <p>a) Computer data and software, hardcopy of County information, and all County data, constitute "confidential information" and shall not be commercially exploited by Contractor in any manner whatsoever.</p> <p>b) Contractor shall not disclose to the public any confidential information, excepting it may disclose such information to State and Federal government agencies or Departments, as is necessary to perform the services provided hereunder.</p> |
|--|--|--|



City Data Services, LLC

Section 2: Prequalifications



City Data Services, LLC

Section 2: Pre-Qualifications

City Data Services meets all of the pre-qualifications requirements as set forth in RFP #10649, including experience, performance, scheduling, pricing, environmental practices and integrity.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'C Davidson'.

Christina Davidson, Partner
City Data Services



City Data Services, LLC

Section 3: Project Experience & References



City Data Services

Company Background and Experience

City Data Services began providing services in 2007; developing web-based solutions for cities and counties to manage reporting on multi-funded community services and all housing programs and projects. Many of our clients are in the San Francisco Bay Area, however, we have clients from Martinez to Ventura. In addition, we have developed several business systems for various non-profit organizations.

CDS' system is a web-based management system hosted on third party servers and accessed through the internet. It is not canned software. There are no license fees, no seat fees, and no limits on users. The system is accessed with user names and passwords for all users. Our charges are based upon software development, day-to-day management (upgrades and improvements) and general support – customer service, trainings, fielding questions or requests. We are very conscientious about the public dollar. We endeavor to work with our clients to provide the most cost effective and efficient system that will meet their needs. CDS builds on the premise that one piece of information entered by the person generating the data, should inform any and all documents needed to manage their project including but not limited to contracts, periodic reports, requests for reimbursements and subsequent applications.

Following are some of the features that make CDS's systems outstanding:

- 1) It is cloud-based and has the look and feel of your paper system.
- 2) Changes can be made quickly and efficiently and without making systemic changes.
- 3) Standard CDBG management forms (applications, periodic reports, compliance forms, fiscal summaries, requests for reimbursement and all other forms) are put in place by CDS and easy to use by City staff and sub-recipients within weeks of contracting with CDS.
- 4) Nominal time in training is required for staff and sub-recipients to be comfortable using the system, in any case, we are available M-F 8-6 by phone, text or email. During critical reporting and application periods, we are available 24/7.
- 5) Shortly after staff begins using CDS forms, staff will begin to recognize the dynamic, robust nature of the system, they find they want to make adjustments and add features. CDS responds promptly and without additional charges to these requests; regularly making minor adjustments to forms and reports.
- 6) In the last 10 years, we have had no systemic down time.

The web based system is very efficient and extremely dynamic. All forms are made to complete on-line and these forms are printable. Typically, we start with on-line versions of existing forms used by sub-recipients to apply for funds, create reports, and fiscally manage their programs and projects. Within these forms calculations are performed and advance information from data entry pages into reports. Again, the premise is that one piece of information is entered once and that information populates other aspects of the system that require the information to generate reports.

After the initial development of forms and processes an evolution will occur as staff recognizes ways to streamline their process and capture additional data. There is no down time. Once forms come in to place they are usable immediately. CDS will train users as quickly as City staff prefers.

Following are some functions of City Data Services' cloud-based data management systems:

- Provide access to respond to requests for proposals and applications for funding.
- Has an upload feature for attachments to various documents including applications and requests for reimbursement.
- Export documentation to other public systems like HUD or to Excel and Word documents.
- Provide review and scoring of applications.
- Track application scores.
- Track recommendations and funding amounts for HUD annual Action Plan.
- Support generation, approval and execution of grant and loan agreements.
- Support sub-recipient submittals of performance and financial reports.
- Track and report on performance measure and financial status.
- Provide all aspects of fiscal management.
- Provide all aspects of monitoring and compliance.
- Support sub-recipient submission of payment requests.
- Track and report on payment requests and approvals.
- Track and reports on the funding balances.
- Manager Page links generate reports and analysis in real time, 24/7.
- Create, display, print and archive compliance monitoring forms.
- Create, display, print and archive quarterly reports.
- Create, display, print and archive annual reports.
- Create, display, archive and print compliance summaries.
- Create, display, archive and print annual Action Plan and CAPER report summaries for inclusion in the CAPER report as required by HUD.
- Interface with IDIS for electronic submission of demographic and other data.

Throughout development and implementation minor improvements are put in place without any down time to upgrade as is often associated with other software products. CDS is available Monday-Friday, 8-6 via phone or email, however; CDS regularly responds to off hour requests. The average response time to resolve issues is under 2 hours.

Our business is a Limited Liability Corporation, we are located at 403 Alvarado Street, Brisbane, CA 94005. Resumes for the principals, Christina Davidson and Steve Crounse are included.



City Data Services, LLC

Section 3: Experience and References, Scope of Work for Three Other Jurisdictions

The systems we develop cover three broad areas: community services, multi-family housing and single family housing and a stand-alone software product, Spectr®, (intended to use on a tablet for onsite monitoring of Housing Quality Standards (HQS) and HUD's HOME housing units).

When a client purchase a module, it covers everything in that module, however, our clients typically direct us build out specific areas according to their needs. So our systems are customized standards so each system has a look and feel of the jurisdiction that it functions in.

The following clients have systems that perform the functions that you are seeking proposals for. These jurisdictions utilize different components to a greater or lesser degree. For example, Salinas has all modules, community services, multi-family and single family. They, more than any other jurisdiction, utilized the single family module for loan and grant compliance with their first time buyer clients. In Alameda County, they have a large inventory of HOME and HQS housing and Staff has built out their CDS multi-family system with substantial use of Spectr® for onsite compliance inspections. The City of Berkeley has multiple sources of funds for affordable housing and utilizes CDS's Multi-Family component for managing hundreds of their units. In any case, all of these jurisdictions with CDS software, use the features that you list in your scope of work. Their contact information is included in this section.

Portion of **Scope of Work** for following jurisdictions:

City of Salinas: 2010 – Present

City of Berkeley: 2010 - Present

County of Alameda: 2015 – Present

A. PROPERTY MANAGEMENT

1. Track property ownership from original developers through all subsequent owners
2. Store documents related to the City/County's interest in the property, Deeds of Trust, Loan Documents, Agreements, etc.
3. Track County financial interest in properties including, but not limited to, the original source of City/County funding, grant number/s, amounts, loan committee approvals, etc.
4. Store documents related to any financial support for the project including, but not limited to, required grant or loan reports and agreements

B. DOCUMENT PREPARATION

1. Populate all documents necessary to transfer single family units between owners, e.g. seller's name, buyer's name, unit address, legal description, etc.
2. The City/County will provide all document templates and provided updated forms as necessary to ensure that all documents meet grant terms and comply with all applicable laws and regulations.
3. Loan Maturity Demand Letters

C. MONITORING MANAGEMENT

1. Create form letters and documents required for annual monitoring
2. Allow property owners to upload completed documentation for review and storage
3. Notify property owners who have not completed the required monitoring

D. NOTIFICATIONS

1. Automatically notify City/County staff 90-days before any changes in any terms, e.g. affordability term expiration, or loan maturity.

E. REPORTING

1. Run reports and queries from data submitted, (i.e. demographics, by developer, by planning area, etc.)
2. Run reports on current and historical monitoring compliance by property and owner
3. The City/County should, at any time and without assistance, be able to export all data stored in the selected system in to either a Microsoft Access or Excel formatted file.



City Data Services, LLC
Section 3: Experience and References

City of Salinas
Anastasia Wyatt
26 West Alisal Street, 2nd Fl.
Salinas, CA 93901
831.758.7489
anastacia.wyatt@ci.salinas.ca.us

City of Berkeley
Lourdes Chang
2180 Milvia Street FL 2
Berkeley, CA 94704
510.981.5263
LChang@cityofberkeley.info

County of Alameda
Catherine Farrow
224 W. Winton Avenue, Room 108
Hayward, CA 94544-1215
510.670.5946
catherine.farrow@acgov.org

CHRISTINA E. DAVIDSON

EXPERIENCE

10-07 to Present - Partner/System Architect - CITY DATA SERVICES

Design and develop concepts and content for comprehensive web-based data management systems for managing all housing and community service programs/projects including monitoring and compliance. Day to day management including customer service, training and marketing.

9-02 to 10-08 Redevelopment/Economic Development Coordinator- Project Manager

CITY OF LIVERMORE – Part of the management team, developed, implemented and managed City and Agency economic, redevelopment, Brownfields remediation, development of Cultural Arts Commission and managed development of City's Cultural Arts Master Plan, ArtsAlive. Worked closely with City Council, staff, developers, and public to develop comprehensive strategies for redeveloping Downtown Core area. Duties included all aspects of land assemblage, relocation, and marketing to developers. Assisted with public policy development and implementation.

*Comprehensive Brownfields Assessment and Remediation for Project Area
Business Retention & Recruitment Projects
City Website Designer-Content Developer
Housing and Human Services Programs & Projects*

3-00 to 6-04 Community Development Consult

- METAL ENGINEERING, Inc.- Santa Rosa, CA - Worked for owner to facilitate development and construction of 100 unit project in City's Redevelopment Project Area. Worked with Client and apartment builder-owners to assist redevelopment of 2 city blocks of Redevelopment Project Area in Santa Rosa.
- HOUSING AUTHORITY OF COUNTY OF STANISLAUS
- CITY OF PATTERSON - Housing Rehabilitation Loan Committee

6-02 to 6-04 Community Development Consultant

CITY OF OAKDALE – Spearhead historic renovation of First National Bank building, 1909 including RFP/RFQ and marketing facility once renovated, business recruitment for Redevelopment Project Area, work with local businesses and Chamber of Commerce to develop multiple Business Improvement Areas (BIAs), assisted with redevelopment of public space including signage and enhancements in redevelopment project area; recruited retail businesses to the City.

11-01 to 9-02 Housing Manager

CITY OF CONCORD- Managed Housing Division & Staff including residential rehabilitation services, single and multifamily development and provision of city-wide housing program information. Developed and managed division budget (10 year projections).

8-99 to 11-01 Director of Administration –Special Programs and Projects

HOUSING AUTHORITY OF COUNTY OF STANISLAUS – Managed day to day and long term planning for following Divisions: Administration, Management Information Systems (MIS), Personnel & Special Programs/Projects (including HHS)

Relevant Projects: Managed financing, development and renovations of multi-family housing projects
Managed agency-wide transition to Yardi software
Website designer and content developer

10-98 to 8-99 Housing and Economic Development Specialist II

CITY OF SAN MATEO – Developed, implemented and managed city and redevelopment agency, housing, economic and redevelopment programs and projects for three city districts

1-96 to 10-98 Community Redevelopment Specialist II - Housing Division Manager.

CITY OF PINOLE

Steve Crounse

citydataservices@yahoo.com

SKILL SUMMARY: Extensive experience in software development in a wide range of languages and applications. Especially skilled at developing innovative solutions to complex problems, being able to work creatively with available resources, and timely, excellent customer service.

SOFTWARE EXPERIENCE: Thirty four years' extensive experience developing software including Perl and PHP applications. Designed and developed dozens of different MySQL or data driven web applications, both for data management, e-commerce and informational websites.

Partner/Software Developer, City Data Services, 2007-Present

Developed software for City Data Services, a cloud-based data management system designed specifically for government uses.

- CDS systems provides staff a means for managing all aspects of government funded and managed community services, housing programs & projects.
- The CDS system significantly improves productivity, reduces paper and other resource usage in the management of general fund, CDBG, HOME, ESG, HOPWA, capital projects, First Time Home Buyer, residential rehabilitation projects, special tax funds, set asides, redevelopment - any programs, projects and/or funds utilized by local, city, county, state and federal government.
- On-going development of complex sets of integrated web pages using Perl, PHP, and MySQL databases that dramatically reduce the amount of time required to manage applications, contracts, reports, monitoring and compliance.
- Developed software that facilitates integration into HUD's IDIS.

COO/CFO, Partner, Best Sports Apparel, 1999-2008

Created the concept for Best Sports Apparel, an Internet retailer of licensed pro sports apparel, in 1999, and guided the development of the company from startup through maturity at \$4 Mil in sales. (www.bestsportsapparel.com)

- Developed all web applications and software for Best Sports website.
- Managed all financial resources of the company, including financing, cash flow, accounting, AP and AR.
- Developed simple and innovative inventory hardware and software to automate and foolproof inventory management and ensure each customer received exactly what they ordered.
- Developed automated software to update online inventory within minutes of each sale or receipt of goods, ensuring that only in-stock items are displayed for purchase.

COO/CFO, Partner, Custom Camera Design, 1994-1999

Co-develop company concept for Custom Camera Design, an innovative company which recycled used single-use cameras from photo labs and refurbished, reloaded, and custom-packaged them for corporate and promotional customers as well as photo labs and retail customers. Guided the development of the company from startup through sale at \$6 Mil in sales.

- Managed all financial resources of the company, including financing, cash flow, accounting, AP and AR.
- Developed all hardware and software to control a custom-designed automated film-rolling machine that produced 400 rolls of film/hr, order taking & inventory management.

COO/CFO, Partner, Private Label Film, 1988-1994

Product available to small photo labs across US. Managed development of company from startup through sale at \$4 Mil in sales.

- With partners, developed innovative equipment and techniques to 'private-label' 35mm camera film. Created the first practical method to private label small quantities of film (50 rolls), to make private labeling
- Managed all financial resources of the company, including financing, cash flow, accounting, AP and AR.
- Developed hardware and software to control film-rolling machines and printing press.

Electrical Engineer, BDM Corporation, 1984-1988

- Hardware and software development, including a rudimentary form of Internet.

Analyst/Engineer, USAF, 1979-1984

- Developed a real-time data mapping application on one of the first available stand-alone, color, graphics terminals.

EDUCATION:

Massachusetts Institute of Technology, BS in Electrical Engineering, 1975-1979.



City Data Services, LLC

Section 4: Technical



City Data Services

Section 4: Technical Aspects of Proposal

City Data Services began providing services in 2007; developing web-based solutions for cities and counties to manage reporting on multi-funded community services and all housing programs and projects. Many of our clients are in the San Francisco Bay Area, however, we have clients from Martinez to Ventura. In addition, we have developed several business systems for various non-profit organizations.

CDS' system is a web-based management system hosted on third party servers and accessed through the internet. It is not canned software. There are no license fees, no seat fees, and no limits on users. The system is accessed with user names and passwords for all users. Our charges are based upon software development, day-to-day management (upgrades and improvements) and general support – customer service, trainings, fielding questions or requests. We are very conscientious about the public dollar. We endeavor to work with our clients to provide the most cost effective and efficient system that will meet their needs. CDS builds on the premise that one piece of information entered by the person generating the data, should inform any and all documents needed to manage their project including but not limited to contracts, periodic reports, requests for reimbursements and subsequent applications.

Following are some of the features that make CDS's systems outstanding:

- 1) CDS is cloud-based and has the look and feel of your paper system.
- 2) Changes can be made quickly and efficiently and without making systemic changes.
- 3) Standard CDBG management forms (applications, periodic reports, compliance forms, fiscal summaries, requests for reimbursement and all other forms) are put in place by CDS and easy to use by County staff and sub-recipients within weeks of contracting with CDS.
- 4) Nominal time in training is required for staff and sub-recipients to be comfortable using the system, in any case, we are available M-F 8-6 by phone, text or email. During critical reporting and application periods, we are available 24/7.
- 5) Shortly after staff begins using CDS forms, staff will begin to recognize the dynamic, robust nature of the system, they find they want to make adjustments and add features. CDS responds promptly and without additional charges to these requests; regularly making minor adjustments to forms and reports.
- 6) In the last 10 years, we have had no systemic down time.

The web based system is very efficient and extremely dynamic. All forms are made to complete on-line and these forms are printable. Typically, we start with inputting all your developers, owners and other user information including details of regulatory agreements in multi-family and loan information for single family. Once this information is in, we place electronic versions of existing forms used by sub-recipients to comply with income and rental requirements and subsequently begin report generation. This process is also used to develop the fiscal components of our systems. Within these forms calculations are performed and advance information from data entry pages into reports. Again, the premise is that one piece of information is entered once and that information populates other aspects of the system that require the information to generate reports.

After the initial development of forms and processes an evolution continues as staff recognizes ways to streamline their process and capture additional data. There is no down time. Once forms come in to place they are usable immediately. CDS will train users at the pace County staff prefers.

Following are some functions of City Data Services' cloud-based data management systems:

- Provide access to respond to requests for proposals and applications for funding.
- Has an upload feature for attachments to various documents including applications and requests for reimbursement.
- Export documentation to other public systems like HUD or to Excel and Word documents.
- Provide review and scoring of applications.
- Track application scores.
- Track recommendations and funding amounts for HUD annual Action Plan.
- Support generation, approval and execution of grant and loan agreements.
- Support sub-recipient submittals of performance and financial reports.
- Track and report on performance measure and financial status.
- Provide all aspects of fiscal management.
- Provide all aspects of monitoring and compliance.
- Support sub-recipient submission of payment requests.
- Track and report on payment requests and approvals.
- Track and reports on the funding balances.
- Manager Page links generate reports and analysis in real time, 24/7.
- Create, display, print and archive compliance monitoring forms.
- Create, display, print and archive quarterly reports.
- Create, display, print and archive annual reports.
- Create, display, archive and print compliance summaries.
- Create, display, archive and print annual Action Plan and CAPER report summaries for inclusion in the CAPER report as required by HUD.
- Interface with IDIS for electronic submission of demographic and other data.

Throughout development and implementation minor improvements are put in place without any down time to upgrade as is often associated with other software products. CDS is available Monday-Friday, 8-6 via phone or email, however; CDS regularly responds to off hour requests. The average response time to resolve issues is under 2 hours.

Workflow

Upon contract agreement, CDS will begin developing the framework for the multi-family and single family system (10 days). Once we receive housing owner/manager and single family information described in Section 5.3.1.1, we will integrate the information into the system (10 days) and begin training staff, issue user names and passwords and begin training on-site managers and other users, (10 days) by end of 30 days, with County staff cooperation, a robust system should be in place.

It is best if there is a dedicated staff person available to assist with inputting program and project information that is not included in information from Section 5.3.1.1.

County of Monterey
Housing Loan & Contract Management System
/ Timeline*

Multi-Family Component #1					
Module	Broad Area of Database	Electronic Deliverables From County Staff to CDS	County Staff Timeline	Cloud-Based Deliverables From CDS	CDS Work & Launch Timeline
Existing Units New Development Acquisition/ Acquisition/ Rehabilitation Special Needs	Contract details	Phase I Access to current data system and/or spreadsheets and/or Word docs with all single family loan data.	May 14 - June 1, 2018	System frame work, initial details of projects and programs.	May 14 - June 14, 2018
	Reports, forms, etc.	Phase II All forms, applications, reports such as progress/activity reports, IDIS or other specialized information, compliance documents/forms, monitoring forms, contract docs, assessment forms, summary reports, applications, insurance documents, any reports wanted.	June 1 - 15, 2018	All information delivered by County Staff and related calendars, income limits, etc. will be integrated electronically in County's CDS system	May 14 - June 14, 2018
	Fiscal (request for reimbursement, draws, etc.) and application assessments	Phase III All fiscal forms and reports/ summaries for all funders, payment requests, expense summaries, CAPER Reports, application scoring forms, committee assessment forms, various HUD, State and any other forms.	May 14 - June 14, 2018	All information delivered by County Staff and related ancillary forms and functions will be available and integrated electronically in County's CDS system.	May 14 - June 14, 2018

Single Family Component #2

Module	Broad Area of Database Management Component	Electronic Deliverables From County Staff to CDS	Staff Timeline	Cloud-Based Deliverables From CDS	CDS Work Timeline
First Time Buyer, all single family housing loan and/or purchase program information.	Contract details	<p>Phase I Access to current data system and/or spreadsheets and/or Word docs with all single family loan data.</p>	May 14, 2018- June 1, 2018	System frame work, initial details of projects and programs.	May 14 – June 14, 2018
	Loan Docs and Compliance Reports, Forms, etc.	<p>Phase II All forms, applications, reports such as occupancy letters or other single family specific documents and forms, monitoring forms, contract docs, loan docs, assessment forms, summary reports, insurance documents any required documents.</p>	May 14 – June 14, 2018	All information delivered by County Staff and related calendars, income limits, etc. will be integrated electronically in County's CDS system	May 14 – June 14, 2018
	Fiscal (request for reimbursement, draws, etc.) and any assessment tools.	<p>Phase III All fiscal forms and reports/ summaries for all funders, payment requests, expense summaries, reports, application scoring forms, committee assessment forms, various HUD, state and any other forms.</p>	May 14 – June 14, 2018	All information delivered by County Staff and related ancillary forms and functions will be available and integrated electronically in County's CDS system.	May 14 – June 14, 2018

SpectR© HQS/HOME Software, Component #3					
Module	Multi-Family Housing Compliance Component	Electronic Deliverables From County Staff to CDS	County Staff Timeline	Cloud-Based Deliverables From CDS	CDS Work Completion
SpectR©	HQS and HOME Compliance System	Phase I Developer name and contact information and/or unit information for HOME and/or HQS units requiring inspections this fiscal year. FY 2017-18 and/or FY 2018	May 14 – June 1, 2018	HQS and HOME Compliance and Monitoring System for all Inspections Link to desktop information	May 14 – June 14, 2018
	HQS and HOME Compliance System	Phase II Remaining developer name and contact information and/or unit information for HOME and/or HQS units requiring inspections. FY 18-19, etc	June 1 – June 10, 2018	Link to desktop information	May 14 – June 14, 2018

*These schedules detail information used to manage single family and multi-family housing. The list is not exhaustive. CDS builds systems that are comprehensive. If there are items not listed and are necessary for managing Monterey County's housing program/projects, the forms, information, etc, are included under this agreement.



City Data Services, LLC

Section 5: Environmentally Friendly Practices



City Data Services, LLC

Section 5: Environmentally Friendly Practices

City Data Services is an owner operated, software, service-company. One of our objectives in developing CDS was to reduce the amount of paper used to manage government activities. We are advocates for renewable energy and use the most energy efficient computer equipment available, our office energy is from renewable sources, we don't commute, however when travel is necessary, when possible we use public transportation. When using materials, in general, as well as for work in Monterey County, we will use recycled resources where possible and endeavor to have little to no energy footprint for our company. We are contentious about resources and environment.

In review of the green certification criteria from both San Francisco County, (our jurisdiction), and Monterey County's *Climate Friendly Purchasing Policy*, it appears that software business criteria are not included in the certification process. It would be helpful to have a category for our type of service provision. It is important to acknowledge all endeavors to recognize ways to address climate change.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'C Davidson'.

Christina Davidson, Partner
City Data Services



City Data Services, LLC

Section 6: Pricing

Section 4: Technical Aspects
SCOPE OF SERVICES RFP #10649

City Data Services proposes to provide the following system features for the following modules:

1. **Single Family Housing Loan Management**
2. **Multi-family Housing Management, including Monitoring/Compliance**
3. **SpectR® HQS and HOME Onsite Monitoring/ Compliance**

Software Development

Develop all associated forms for housing data management including but not limited to: applications, reports, contracts, fiscal management forms, monitoring forms, compliance forms and data assessment forms (ie, spreadsheets and reports);

- Ability to enter, display and summarize individual project/program report information;
- Ability to enter, display and summarize individual project/program contract information;
- Ability to enter, display and summarize individual project/program compliance information;
- Ability to enter, display and summarize individual project/program expense information;
- Ability to enter, display and summarize individual project/program compensation information;
- Ability to enter, display and summarize individual project/program monitoring information;
- Ability to enter, display and summarize individual project/program administration information; and
- Ability to enter, display and summarize individual project/program assessment information.

System Maintenance

Ability to enter, store, display, and summarize applications, reports and fiscal information to assist with management of Housing services, activities and compliance;

- Ability to store, display, and summarize individual program/project administration information;
- Ability to store, display, and summarize individual program contract information;
- Ability to enter, store, display, and summarize compliance information;
- Ability to transmit sub-recipient report information into HUD's reporting system, IDIS, as needed;
- Maintain all database and report elements created under this development proposal for term of contract;
- Modify database as needed to add or remove fields, or improve presentation of data;
- Modify existing reports as needed to meet County of Monterey's requirements;
- Promptly respond to customer service requests from County of Monterey and their clients throughout term of contract and
- Promptly respond to request for assistance, training, or database repair.

Specifically as described in RFP 10649, Section 5:

5.2 PROPERTY MANAGEMENT

- 5.2.1 Track property ownership from original developers through all subsequent owners
- 5.2.2 Store documents related to the County's interest in the property, e.g. Deeds of Trust, Loan Documents, Agreements, etc.
- 5.2.3 Track County financial interest in properties including, but not limited to, the original source of County funding, grant number/s, amounts, loan committee approvals, etc.
- 5.2.4 Store documents related to any financial support for the project including, but not limited to, required grant or loan reports and agreements

5.3 DOCUMENT PREPARATION

- 5.3.1 Populate all documents necessary to transfer single family units between owners, e.g. seller's name, buyer's name, unit address, legal description, etc.
 - 5.3.1.1 The County will provide all document templates and provided updated forms as necessary to ensure that all documents meet grant terms and comply with all applicable laws and regulations.
- 5.3.2 Loan Maturity Demand Letters

5.4 MONITORING MANAGEMENT

- 5.4.1 Create form letters and documents required for annual monitoring
- 5.4.2 Allow property owners to upload completed documentation for review and storage
- 5.4.3 Notify property owners who have not completed the required monitoring

5.57 NOTIFICATIONS

- 5.5.1 Automatically notify County staff 90-days before any changes in any terms, e.g. affordability term expiration, or loan maturity.

5.7 REPORTING

- 5.7.1 Run reports and queries from data submitted, (i.e. demographics, by developer, by planning area, etc.)
- 5.7.2 Run reports on current and historical monitoring compliance by property and owner
- 5.7.3 The County should, at any time and without assistance, be able to export all data stored in the selected system into either a Microsoft Access or Excel formatted file.

Our web portal is a certified secured site (identified by the lock symbol on the url) and hosted/backed up on cloud based, third party servers, (the same that Wall Street utilizes). Unique user names and passwords are generated for all users. In eleven years, we have not had any down time and no data breaches.

Section 6: Pricing
ATTACHMENT A: COST SHEET

<i>Description of Service</i>	<i>Estimated Rate \$</i>	<i>Per [Hourly/Month/Quarterly/Annual/Flat Rate/Other]</i>
Maintenance Fee		Monthly
Ad Hoc Reporting		Included in Maintenance Fee
Single Family (SF) One-time fee for set-up	\$18,500	One Time Flat Rate Due upon signing of contract
Maintenance Fee for SF	\$525	Monthly (Initial payment: 1 st Quarter, \$1,575, due beginning of contract signing - 2018)
Billing Cycle		Annual -- Beginning of fiscal year
Multi-Family (MF) One-time fee for set-up (Including license for SpectR©)	\$19,500	Due upon signing of contract
Maintenance Fee for MF including SpectR©	\$725	Monthly (Initial payment: 1 st Quarter, \$2,175, due beginning of contract signing -2018)
Billing Cycle		Annual -- Beginning of fiscal year \$8,700
Total Cost for 5 Year Period:	\$113,000	
<u>Deliverable</u>	<u>Total Cost</u>	
Public Participation Plan		Included in Maintenance Fee
Admin Draft		Included in Maintenance Fee
Final Report		Included in Maintenance Fee
Meetings		Included in Maintenance Fee
<u>Progress Payment Amounts</u>	<u>% of Deliverable Total/Actual Costs/Other</u>	
Affordable Housing Nexus Study		Included in Maintenance Fee
Fee Schedule Options		Included in Maintenance Fee
Other Progress Payments	Hourly/Actual	Included in Maintenance Fee
Fee Basis		Included in Maintenance Fee
Staff Costs		Included in Maintenance Fee
Data Costs		Included in Maintenance Fee
Travel Costs	NTE IRS per Monterey County Travel Policy	
Other Costs		Included in Maintenance Fee



City Data Services, LLC

Section 7: Exceptions

SIGNATURE PAGE

COUNTY OF MONTEREY
CONTRACTS/PURCHASING DIVISION

RFP #10649
ISSUE DATE: Thursday January 25, 2018



RFP TITLE: Affordable Housing Data Management Services

PROPOSALS ARE DUE IN THE OFFICE OF THE CONTRACTS/PURCHASING
OFFICER BY

3:00 P.M., LOCAL TIME, ON Friday March 2nd, 2018

MAILING ADDRESS:
COUNTY OF MONTEREY

CONTRACTS/PURCHASING OFFICE
1488 SCHILLING PLACE
SALINAS, CA 93901

QUESTIONS ABOUT THIS RFP SHALL BE DIRECTED TO
Jaime Ayala, EMAIL AyalaJ@CO.MONTEREY.CA.US, (831) 783-7047

CONTRACTOR MUST INCLUDE THE FOLLOWING IN EACH PROPOSAL (1 original plus 3 copies):

☐ ALL REQUIRED CONTENT AS DEFINED PER SECTION 7.1 HEREIN.

This Signature Page must be included with your submittal in order to validate your proposal.
Proposals submitted without this page will be deemed non-responsive.

☐ CHECK HERE IF YOU HAVE ANY EXCEPTIONS TO THIS SOLICITATION.

CONTRACTOR MUST COMPLETE THE FOLLOWING TO VALIDATE PROPOSAL

I hereby agree to furnish the articles and/or services stipulated in my proposal at the price quoted, subject to the instructions and conditions in the Request for Proposal package. I further attest that I am an official officer representing my firm and authorized with signatory authority to present this proposal package.

Company Name: City Data Services, LLC

Date February 28, 2018

Signature: 

Printed Name: Christina Davidson

Street Address: 403 Alvarado Street

City: Brisbane State: CA Zip: 94005

Phone: (415) 572-4572 Fax: NA Email: citydataservices@yahoo.com

License No. (If applicable): NA

License Classification (If applicable): NA



City Data Services, LLC

Section 8: Appendix

CDS

City Data Services, LLC

Appendix A

The appendix includes two components, one single family with various screen shots of components of the system and another for SpectR®, a detailed explanation follows. This information is not comprehensive by any means, it is a sample of the type of work and system integration that City Data Services provides.

SpectR®, developed by City Data Services, LLC is software for use in the field to assist with conducting onsite HOME and HQS monitoring. SpectR® is designed to integrate with the CDS multi-family housing database to provide efficient, accurate reporting on the condition of units developed with federal funds and included with this proposal. It is used on a tablet or laptop for field access without use of internet (hardware is not included in this system). After loading a tablet with the software, uploads from County's multi-family system, inspections are conducted in the field. Upon return the inspection information is uploaded to Staff desktop and retained as well as informing other reports and documents.

SpectR® provides:

- Ability to store, display, and summarize individual HOME and HQS housing project unit inspection information
- Ability to store, display, and summarize collective HOME and HQS housing project inspection information;
- Modify database as needed to add or remove fields, or improve presentation of data as required by HUD; and
- Modify HOME and/or HQS reports as needed to meet HUD requirements.

Maintenance:

- Maintain all database and report elements created under with this SpectR software;
- Ability to transmit HOME and HQS reports into County's CDS database;
- Provide customer service to County of Monterey and their clients throughout the term of contract; and
- Promptly respond to request for assistance, training, or software repair.

Proprietary screen shots follow. They are under two categories, Single Family and SpectR. Under SpectR, there are two additional categories, desktop and tablet. As the designations suggest, each view is from their respective sources.

Single Family Software from City Data Services©,
 LLC Proprietary Information - Screen Shot
 Examples March 2018

CDBG FTHB Housing Inventory

Name	Address	City/State/Zip	Year Purchased	Purchase Price	Upgrades	Sell Date	Sell Price	Agency Contribution	City Contribution	Loan Total
J. Aurelio	115 Alton Road	Calderon, 93906		\$15,000.00						\$0.00
Quaseta	1418 Bardin Way	Lincoln, 93906	Kennel	\$0.00						\$0.00

You are working in FY 2012/13

Change to FY 2011

Change to FY 2013

Print Letters			
Letter	Date of Letter:	<input type="text"/>	Due Date: <input type="text"/>
2nd Letter	Date of Letter:	<input type="text"/>	Due Date: <input type="text"/>
Notice	Date of Letter:	<input type="text"/>	Due Date: <input type="text"/>
<input type="checkbox"/> Reprint Letters			

CDBG FTHB

	Address	Last Letter	Affidavit	<div>Submit Data</div> Received
<u>Aurelio</u>	115 Afton Road	First: 01/07/2013	01/19/2013	<input checked="" type="checkbox"/>
<u>aristo</u>	1418 Bardin Way	First: 01/07/2013	01/22/2013	<input checked="" type="checkbox"/>
<u>Henry</u>	723 St. Ann Drive	Third: 04/25/2013		<input type="checkbox"/>
<u>Victorino</u>	1515 Del Monte Avenue	Second: 02/19/2013	02/14/2013	<input checked="" type="checkbox"/>
<u>Simon</u>	1529 Del Monte Avenue	Second: 02/19/2013	03/05/2013	<input checked="" type="checkbox"/>
<u>ul</u>	682 St. Augustine Dr	Third: 04/25/2013	05/01/2013	<input checked="" type="checkbox"/>

Single Family Software from City Data Services©,
LLC Proprietary Information - Screen Shot
Examples March 2018

Type	# of Properties	Purchase Value
<u>Inclusionary</u>	145	\$27,714,290
<u>SRA</u>	50	\$9,710,350
<u>Density Bonus</u>	23	\$3,073,323
<u>Affordable Infill</u>	4	\$380,000
<u>CDBG FTHB</u>	6	\$15,000
<u>HOME FTHB</u>	40	\$216,500
<u>Other FTHB</u>	7	\$0
<u>NSP</u>	19	\$185,000
Total Properties:	294	\$41,294,463

SpectR© Software from City Data Services, LLC
 Proprietary Information - Screen Shot Examples
 March 2018

PROJECT - JURISDICTION	LEAD	ASSIGNED	SITE VISIT	NOTIFICATION	MONITORING	REQUIRED	VIEW/PRINT
EAH Housing	2016	Alameda County	Colleen Lopez	October	10/17/2017	09/12/2017	View/Print
Resources for Community Development	2016	Alameda County	Colleen Lopez	November	11/17/2017	10/02/2017	View/Print
Concord House	2016	Alameda County	Colleen Lopez	December	12/22/2017	10/20/2017	View/Print
Dwight Way	2015	Alameda County	Colleen Lopez	January	01/18/2018		View/Print
Herman Gardens	2016	Alameda County	Colleen Lopez	December	12/08/2017	10/18/2017	View/Print
Harrison Hotel	2015	Alameda County	Colleen Lopez	January	01/11/2018		View/Print
Piazza Drive - Shared MHSA House	2017	Alameda County	Colleen Lopez	January			View/Print
Spartan Way Commons		Alameda County	Colleen Lopez	January			View/Print

Completed Monitorings - FY 2017 Change to FY 2018/17

Project	Manager	Lead	Jurisdiction	Assigned	Staff	Date	Letter	Sent	Monitoring	Report Date	Required	Response Date
Sister me Home/Safe House	BFWC/APC	Alameda County	Colleen Lopez	10/12/2016	09/01/2016	03/01/2017						
Sister me Home/Safe House	BFWC/APC	Alameda County	Colleen Lopez	02/13/2017	02/01/2017	03/01/2017						

Monitoring Compliance Chart

Sort by Developer Name
 Sort by Monitoring Due Date
 Sort by Last Monitoring
 Submit Monitoring Dates Form

Monitoring Dates need updating

Project	Developer	Next Mon FY	Last Mon	Last Annual Compliance	Last Audit	Last Insp	Next Insp
Adeline Street Apts	Resources for Community Development	2016	07/01/2013	2016 - C	12/31/2016	06/10/2015	2016
Allen Temple Manor	Allen Temple Housing Corporation IV	2017	12/15/2010	2016 - D	09/30/2016	10/30/2017	2018
Amberstar	Resources for Community Development	2019	11/16/2016	2016 - C	12/31/2016	07/29/2015	2017
Arroyo del Valle Commons	Eden Housing	2017	07/01/2013	2016 - C	06/30/2016	07/01/2013	2017

SpectR© Software from City Data Services, LLC
 Proprietary Information - Screen Shot Examples
 March 2018

[Generate Notification Letter](#)

[Go To On-Site Monitoring Form](#)

[Generate Monitoring Report](#)

Project Name: Allen Temple Manor
Owner Name: Allen Temple Housing Corporation IV
Developer Name: Allen Temple Development Corporation No. 2
Property Management Co: Beacon Communities
FY of Monitoring: 2016
Lead Jurisdiction: Alameda County
Assigned Staff: Colleen Lopez

Projected Monitor Month: January
 October
Notification Letter Sent: 10/03/2017
Site Visit Date: 10/24/2017
of units to Monitor: 4
Monitoring Report Sent: 12/14/2017
Required Response Date: 01/31/2018
Monitoring Closed: No

2016
 Alameda County
 Choose
 Colleen Lopez
 Elizabeth Cook
 Jennifer Pearce
 October
 10/03/2017
 10/24/2017
 4
 12/14/2017
 01/31/2018
 No

Compliance Report Contacts

Name	Phone	Email	Address	City, State Zip
Kendra Roberts	925-924-7182	kr Roberts@beaconCommunities.org	6120 Stoneridge Mall Road, Suite 300	Pleasanton, CA 94588

Email List kr Roberts@beaconCommunities.org

[Reset](#)

[Submit Data](#)

**Below Market Rate Housing Program
 On-Site Monitoring Meeting/Interview with Property Management Staff
 Report Period: FY2016**

GENERAL INFORMATION			
Date Prepared:	10/24/2017	Reviewer:	Colleen Lopez
Project Name:	Allen Temple Manor	Address:	7607 International Blvd
Property & Asset Management Staff interviewed on Day of Site Visit:			
Wileen Crosby, Property Manager			
Confirm staffing of on-site property management and maintenance staff:			
On-site Resident Manager (required for properties with >15 units)			
Maintenance Staff (FTE or P/T)			
Other -			
Other -			
Other -			
Funding Source	HOWPA	Funding Amount	\$183,000
Number of units in Property:	23	Number of HCD Restricted units:	4
Number of units to be audited:			

Administrative & Fiscal Review	
1. Is this property on a FY or Calendar Year?	Fiscal Year - September
2. Was the most recent audit received?	Yes <input checked="" type="checkbox"/>
3. Date audit was received?	Unsure
4. Date audit ends?	September 30,
5. Were there any findings in the recent audit?	No <input checked="" type="checkbox"/>
6. Is there evidence that the agency maintains a reserve account?	Yes <input checked="" type="checkbox"/>
7. Are there adequate reserves to maintain the property? Review operating budget.	Yes <input checked="" type="checkbox"/>
8. Do the rents and operating subsidies cover operating expenses and building maintenance?	Yes <input checked="" type="checkbox"/>

SpectR© Software from City Data Services, LLC
 Proprietary Information - Screen Shot Examples
 March 2018

may not conduct or sponsor, and a person is not required to respond to, a collection of information unless that collection displays a valid OMB control number.

Privacy Act Statement. The Department of Housing and Urban Development (HUD) is authorized to collect the information required on this form by Section 8 of the U.S. Housing Act of 1937 (42 U.S.C. 1437f). Collection of the name and address of both the family and the owner is mandatory. The information is used to determine if a unit meets the housing quality standards of the section 8 rental assistance program. HUD may disclose this information to Federal, State and local agencies when relevant to civil, criminal, or regulatory investigations and prosecutions. It will not be otherwise disclosed or released outside of HUD, except as permitted or required by law. Failure to provide any of the information may result in delay or rejection of family participation.

Assurances of confidentiality are not provided under this collection.

This collection of information is authorized under Section 8 of the U.S. Housing Act of 1937 (42 U.S.C. 1437f). The information is used to determine if a unit meets the housing quality standards of the section 8 rental assistance program.

PHA		Tenant ID Number		Date of Request (mm/dd/yyyy)		
Inspector Jenell Newell		Date Last Inspection (mm/dd/yyyy) 06/10/2015		Date of Inspection (mm/dd/yyyy) 09/01/2017		
Neighborhood/Census Tract 424001		Type of Inspection Initial		Project Number		
A. General Information Street Address of Inspected Unit 3224 Adeline Street Berkeley, CA 94703			Unit # 208		Housing Type Garden Apartment	
City Berkeley		County Alameda		State CA		
Zip 94703		Current Telephone of Family				
Name of Family						
Current Street Address of Family 3224 Adeline Street Berkeley, CA 94703						
City Berkeley		County Alameda		State CA		
Zip 94703						
Number of Children in Family Under 6 6						
Name of Owner or Agent Authorized to Lease Unit Inspected				Telephone of Owner or Agent		
Address of Owner or Agent						

B. Summary Decision on the Unit
 (to be completed after the form has been filled in)

Housing Quality Standard Pass or Fail

☒ 1. Fail If there are any checks under the column headed "Fail" the unit fails the minimum housing quality standards. Discuss with the owner the repairs noted that would be necessary to bring the unit up to the standard.

☐ 2. Inconclusive If there are no checks under the column headed "Fail" and there are checks under the column headed "Inconclusive," obtain additional information necessary for a decision (question owner or tenant as indicated in the item instructions given in this checklist). Once additional information is obtained, change the rating for the item and record the date of verification at the far right of the form.

☐ 3. Pass If neither (1) nor (2) above is checked, the unit passes the minimum housing quality standards. Any additional conditions described in the right hand column of the form should serve to (a) establish the

1. Living Room

1.1 Living Room Present

Note: If the unit is an efficiency apartment, consider the living room present.

1.2 Electricity

In order to qualify, the outlets must be present and properly installed in the baseboard, wall or floor of the room. Do not count a single duplex receptacle as two outlets, i.e., there must be two of these in the room, or one of these plus a permanently installed ceiling or wall light fixture. Both the outlets and/or the light must be working. Usually, a room will have sufficient lights or electrical appliances plugged into outlets to determine workability. Be sure light fixture does not fail just because the bulb is burned out.

Do not count any of the following items or fixtures as outlets/fixtures: Table or floor lamps (these are not permanent light fixtures); ceiling lamps plugged into socket; extension cords.

If the electric service to the unit has been temporarily turned off check "Inconclusive." Contact owner or manager after inspection to verify that

SpectR© Software from City Data Services, LLC
Proprietary Information - Screen Shot Examples
March 2018

Inspection Letter Date: 07/27/2017
Ready for Inspection:
Assigned Inspector: Jenell Newell
Inspector Phone: 510-754-1803
Inspector Email: jenellnewell@me.com
Scheduled Inspection Date: 08/28/2017
Scheduled Inspection Time: 8:30 am - 12 noon
Re-Inspection 1 Letter Date 09/13/2017
Scheduled Re-Inspection 1 Date
Scheduled Re-Inspection 1 Time
Ready for Reinspection 1:

Inspection Closed:
Inspection Closed Date:

Notes: Third complex of the day - they were given an 8:30am - 12 noon time frame

Reset

07/27/2017
☒ Check to enable inspector access
Jenell Newell
510-754-1803
jenellnewell@me.com
08/28/2017
8:30 am - 12 noon
09/13/2017
☐ Check to enable inspector access

Choose

Submit Data

Sent Letters

[Adeline Street Apts-07-27-2017-insp notice.doc](#)
[Adeline Street Apts-09-13-2017-fall insp notice.doc](#)

Uploaded Documentation
[2016 insp Completed WO UNIT 204 301 208 partial.pdf](#)

Inspection results

[Unit 208-F](#)
[Unit 301-F](#)
[Unit 310-P](#)
[Unit 204-F](#)

Document to Upload: No file selected.

☐ Mark Inspection as Passed Approved by:

SpectR© Software from City Data Services, LLC
 Proprietary Information - TABLET Screen Shot
 Examples March 2018

1. Living Room		Decision			For each numbered item, check one box only.	Instructions for this form
Mark All Pass		Yes, Pass	No, Fail	Inconclusive		
Item No. and Description					If Fail, what repairs are necessary? If Inconclusive, give details. If Pass with comments, give details.	If Fail or Inconclusive, date (mm/dd/yyyy) of final approval
1.1 Living Room Present Is there a living room?	<input type="radio"/>	<input type="radio"/>				
1.2 Electricity Are there at least two working outlets or one working outlet and one working light fixture?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
1.3 Electrical Hazards Is the room free from electrical hazards?	<input type="radio"/>	<input type="radio"/>				
1.4 Security Are all windows and doors that are accessible from the outside lockable?	<input type="radio"/>	<input type="radio"/>				
1.5 Window Condition Is there at least one window, and are all windows free of signs of severe deterioration or missing or broken out panes?	<input type="radio"/>	<input type="radio"/>				
1.6 Ceiling Condition Is the ceiling sound and free from hazardous defects?	<input type="radio"/>	<input type="radio"/>				
1.7 Wall Condition Are the walls sound and free from hazardous defects?	<input type="radio"/>	<input type="radio"/>				

HQSInsp

Property: Sparks Way Commons

Date: 11/20/2017

Unit:

☐ Unable to Access Unit

Instructions for this form

		Return to Main Page		
		Pass	Incon	Fail
Inspection Setup	Incomplete			
Living Room	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Kitchen	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bathroom	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Other Rooms	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Secondary/Exterior	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Heating/Plumbing	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
General	Incomplete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Housing Quality Standard Pass or Fail

☐ Pass

☒ Inconclusive

☐ Fail

☐ Inspection for this property is Complete

ExistIns



Instructions

View Completed Insps

Return to Main Page

Pending Inspections

11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS

11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS
11/20/2017 - Sparks Way Commons Unit ??? HQS

 Download

— □ ×

Return to Main Page

10/30/2017 - FACT

09/25/2017 - International Blvd Phase I Havenscourt - Reinspect 1

01/22/2018 - Magnolia Terrace

01/29/2018 - Ambassador

12/18/2017 - Miramar-Mariposa

10/16/2017 - North County Womens Center Trans Hsg - Reinspect 1

01/08/2018 - Ocean Ave - Emeryville

11/20/2017 - Sparks Way Commons

01/08/2018 - Avalon Apts.

01/29/2018 - Triangle Court

 NewIns

Instructions for Initiating Inspection

Import Pending Inspections

OR

Property ID/Name

☐ HQS

☐ HOME/UPCS

Start New Inspection

Date

January 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10
Today: 1/11/2018						

Return to Main Page

CDS

City Data Services, LLC

Section 9: Bonds (Insurance)



CERTIFICATE OF LIABILITY INSURANCE

KTR
R001DATE (MM/DD/YYYY)
2/16/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER		CONTACT NAME:	
USAA INSURANCE AGENCY INC/PHS		PHONE (A/C, No, Ext): (888) 242-1430	
812845 P:(888) 242-1430 F:(888) 443-6112		FAX (A/C, No): (888) 443-6112	
PO BOX 33015		E-MAIL ADDRESS:	
SAN ANTONIO TX 78265		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Sentinel Ins Co LTD	
		NAIC# 11000	
		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	COMMERCIAL GENERAL LIABILITY			65 SBM R04156	02/10/2018	02/10/2019	EACH OCCURRENCE	\$2,000,000
	CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$1,000,000
	X General Liab	X					MED EXP (Any one person)	\$10,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						PERSONAL & ADV INJURY	\$2,000,000
	POLICY <input type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC						GENERAL AGGREGATE	\$4,000,000
	OTHER:						PRODUCTS - COM/PO/AGG	\$4,000,000
								\$
	AUTOMOBILE LIABILITY						COMBINED SINGLE LIMIT (Ea accident)	\$
	ANY AUTO OWNED AUTOS ONLY						BODILY INJURY (Per person)	\$
	HIRED AUTOS ONLY						BODILY INJURY (Per accident)	\$
	SCHEDULED AUTOS NON-OWNED AUTOS ONLY						PROPERTY DAMAGE (Per accident)	\$
								\$
	UMBRELLA LIAB						EACH OCCURRENCE	\$
	EXCESS LIAB						AGGREGATE	\$
	DED							\$
	RETENTION \$							\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						PER STATUTE	OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N	N/A				E.L. EACH ACCIDENT	\$
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Those usual to the Insured's Operations. Certificate Holder is an Additional Insured per endorsement to the policy. A Business Liability Waiver of Subrogation applies and coverage is Primary and Non-Contributory per the Business Liability Coverage form SS0008, attached.

CERTIFICATE HOLDER	CANCELLATION
COUNTY OF MONTEREY, ITS OFFICERS, AGENTS AND EMPLOYEES, ECONOMIC DEVELOPMENT DEPARTMENT: HOUSING OFFICE 168 W ALISAL ST FL 3 SALINAS, CA 93901	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE <i>Susan L. Castaneda</i>



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
02/16/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER USAA INSURANCE AGENCY INC 9800 FREDERICKSBURG RD SAN ANTONIO, TX 78288 (888) 661-3938	CONTACT NAME: PHONE (A/C, No, Ext): (888) 661-3938 FAX (A/C, No): (877) 552-8091 E-MAIL: ServiceCenter@travelers.com ADDRESS: ServiceCenter@travelers.com
	INSURER(S) AFFORDING COVERAGE INSURER A : TRAVELERS CASUALTY INSURANCE COMPANY OF AMERICA INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :
INSURED CITY DATA SERVICES 403 ALVARADO STREET BRISBANE, CA 94005	NAIC #

COVERAGES

CERTIFICATE NUMBER: 850222303231740

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS	X		BA-3B500875-18	02/10/2018	02/10/2019	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

AS RESPECTS TO AUTO LIABILITY, CERTIFICATE HOLDER IS ADDITIONAL INSURED AS PER CA T4 42 - ADDITIONAL INSURED - PRIMARY AND NON-CONTRIBUTORY WITH OTHER INSURANCE.

CERTIFICATE HOLDER

THE COUNTY OF MONTEREY AND ITS OFFICERS
AGENTS AND EMPLOYEES
168 WEST ALISAL STREET, 3RD FLOOR
SALINAS, CA 93901

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Mary J. Swan

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
8/22/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


PRODUCER		CONTACT NAME:	
	Insureon (BIN Insurance Holdings LLC.) 1101 Central Expy. South, Suite 250, Allen, TX 75013	PHONE (A/C, No, Ext): 800-688-1984	FAX (A/C, No): 877-826-9067
		E-MAIL ADDRESS:	
		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Hartford Fire Insurance Company	NAIC #: 19682
		INSURER B:	
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	

COVERAGES	CERTIFICATE NUMBER:	REVISION NUMBER:
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.		

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						
	<input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR						EACH OCCURRENCE \$
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
							GENERAL AGGREGATE \$
							PRODUCTS - COMP/OP AGG \$
							\$
	GEN'L AGGREGATE LIMIT APPLIES PER:						
	<input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						
	OTHER:						
	AUTOMOBILE LIABILITY						
	<input type="checkbox"/> ANY AUTO						COMBINED SINGLE LIMIT (Ea accident) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per person) \$
	<input type="checkbox"/> HIRED AUTOS						BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
	UMBRELLA LIAB						EACH OCCURRENCE \$
	EXCESS LIAB						AGGREGATE \$
	<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE						\$
	<input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/>
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability (Errors and Omissions)			46TE0323528	7/7/2017	7/7/2018	\$1,000,000 / \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Those usual to the Insured's Operations. Individually and collectively per the professional liability / errors & omissions policy per Policy Form FS00G003001016 in the attached policy.

CERTIFICATE HOLDER	CANCELLATION
	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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