



UNITED NEIGHBORHOOD ORGANIZATION (“UNO”)

Request for Proposal (“RFP”)

For

Strategy and Communication Services

All proposals must be sent electronically to:

unobidresponse@uno-online.org

All communications should be addressed to:

Solskin Gomez-Krogh, Interim Executive Director

sgomezkrogh@uno-online.org

Issued on Wednesday, April 27, 2016

Proposals must be received no later than 12:00 p.m., Central Time, on May 11, 2016.

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I. SUMMARY

A. Company Background

In 1984, UNO began as a grassroots effort between community groups, block clubs and churches to fulfill the developmental needs of the Hispanic immigrant community in Chicago. By creating elements that unite communities, UNO believes in the potential to transform entire neighborhoods, giving families a better chance at achieving the American dream. Over the past 30 years, UNO has focused on three direct principles: improving education, promoting citizenship and cultivating leaders, all to ensure the economic advancement for generations of Hispanics, and setting an example of what's truly possible.

Today, UNO has emerged as the largest organization of its kind in the region, dedicated to the successful assimilation of Hispanics into American society. Nearly 20,000 individuals participate in UNO sponsored community events and forums each year. Following a rich tradition in education, civic responsibility and community leadership, the UNO network is a proven organization known for creating pathways and opportunities for the nation's largest immigrant community, a vital part of our city's history and future.

B. Purpose of Request for Proposal ("RFP")

This RFP invites the submission of Proposals for UNO's purchase of **strategy and communication services**. Please note that one or more vendors may be selected to provide goods or services meeting the minimum qualifications herein.

C. Details of Resulting Award

UNO is seeking to award a **3-month engagement** to a **strategy and communications** agency. The contract may be renewed as mutually agreed upon by both the successful agency and UNO. The winning bidder may subcontract with other firms, as appropriate, pending the approval of UNO.

II. SCOPE OF SERVICES

The following section describes the scope of services required to be performed by a selected Respondent. Further details on preparing Proposals in response to this RFP, the evaluation criteria, and conditions of submitting a Proposal can be found in the sections that follow. Respondents are encouraged to thoroughly read this RFP **in its entirety** before submitting a Proposal.

D. Description of Services

The selected Respondent will be required to perform the Services and furnish the Deliverables described in this Section. The United Neighborhood Organization (UNO) is requesting proposals from qualified strategy and communication agencies to serve the board of directors and leadership team.

Respondents should address their competencies with respect to each component when responding.

The selected Respondent will be expected to perform the following Services and Deliverables:

- Assess organizational capacities, inventory assets and identify areas of improvement to ensure success and advancement of UNO. This process will include reviewing current and past operations, processes, and assets.
- Facilitate a board of director's retreat that results in the identification of a new mission and vision for UNO and creates a timeline with goals and deadlines.
- Develop and create a simple and concise 12-month strategic plan. This plan should include strategies on how to organize and rebuild trust in the community.
- Develop a long-term strategic plan that includes staff, board of directors, and key stakeholders, which will guide UNO for the next three years, including but not limited to next steps, staff size and organizational structure, board growth and leadership structure.
- Perform research to aid in identifying opportunities within both the local and business communities. Identify UNO's current position and that of other similar non-profits. Analyze all relevant research to recommend the best strategies and outreach channels.
- Develop and create an outreach and external affairs strategy. The strategy will help engage elected officials, community stakeholders and potential partner organizations.
- Work with the board of directors and staff to develop and execute a strategic communications plan. The communications plan should include a media and digital kit that will target all stakeholders, including but not limited to community leaders, business partners and sponsors.
- Support UNO with responses to all media and external stakeholder inquiries.
- Work with leadership and board of directors to develop a fundraising and revenue plan.
- Assist with the development of criteria for recruitment of Executive Director and the evolution of the role.

Ideal candidates will have demonstrated experience and expertise in branding, identity, public relations, graphic design, creative planning, copywriting, plan development and implementation with a general understanding of such activities within the Latino Nonprofit industry.

The winning bidder may subcontract with other firms, as appropriate, pending the approval of UNO.

III. EVALUATION CRITERIA

A. Evaluation Criteria, Generally

For the purposes of evaluating Proposals received as a result of this RFP, UNO will base its evaluation on the following criteria:

1. Price;
2. Experience and reputation in working similar entities; and
3. Completeness and timeliness of Proposal, as further described herein; and
4. Demonstrated success working on community marketing programs

UNO reserves the right to consider additional factors during the evaluation phase, regardless of whether such factors are specifically cited in this RFP.

******Please note that any evaluation of Proposals submitted will take place after a determination is made with respect to a Respondent's compliance with the requirements of the form of response. Please see Section IV for such requirements. Further, please note that UNO is under no obligation to request clarification from Respondents regarding their Proposals.******

B. Respondent Qualifications

The evaluation of Respondent's qualifications will be based on the following information that is to be furnished in the Proposal, as described below:

1. Qualifications: Respondents will be expected to provide a general description of the Respondent, including its location, principal place of business, **and years in business**. As described below, the general description of a Respondent's qualifications should include a list of the Respondent's ownership, officers and executive management.
2. Related Experience and References: Respondents will also be evaluated on their experience providing products and services, especially to UNO or other nonprofit corporations.
3. Financial Information: The financial condition of Respondents may also be a factor in evaluating Respondents' basic qualifications to provide the services and deliverables described herein. Respondents will be expected to provide financial information concerning the solvency of their businesses, including the following:
 - a. Gross annual revenue
 - b. Cash flow statement
 - c. Number of employees currently employed

C. Evaluation Process

An Evaluation Committee ("EC") will review and evaluate the Proposals. UNO reserves the right to enlist independent consultants to assist with the evaluation of all or any portion of a Proposal, as it deems necessary. The EC will first assess the Respondent's compliance with and adherence to the requirements of the solicitation. Any Proposal that is incomplete and missing key components necessary to fully evaluate the response may, at the sole discretion of UNO, be rejected from further consideration due to "non-responsiveness."

The EC will then evaluate the extent to which a Proposal meets the project requirements set forth in the solicitation. The EC may also review any other information that is available to it, including but not limited to, information gained by checking references and by investigating the Respondent's financial condition. Any material misrepresentation made by a Respondent may void the Proposal and eliminate the Respondent from further consideration.

The EC may also request that Respondents present their Proposal in person.

IV. FORM OF PROPOSALS AND REQUIRED DOCUMENTATION

A. Format of Proposals

Sections should be separated by labeled tabs and organized in accordance with subject matter sequence as set forth below. Each page of the Proposal must be numbered in a manner so as to be uniquely identified. Proposals must be clear, concise, and well organized.

B. Submittal Requirements

Respondents are advised to adhere to the submittal requirements of the RFP. Failure to comply with the instructions of this RFP may be cause for rejection of the non-compliant Proposal at the sole discretion of UNO. By submitting a response to this RFP, you are acknowledging that if your Proposal is accepted by UNO, your Proposal and related submittals may become part of the contract.

Proposals must include the following items:

1. Cover Letter

Respondent(s) must submit a cover letter signed by an authorized representative who is capable of committing the Respondent to providing the products and any related services described in this RFP. The cover letter must include:

- a. A brief description of the Respondent, including its legal name, location, principal place of business, and years in business;
- b. Federal Tax ID;
- c. The name and telephone number of the principal contact for negotiations; and
- d. Acknowledgement of receipt of any addendum issued by UNO, if applicable.

2. Executive Summary

Respondent must provide an executive summary which explains its understanding of UNO's intent and objectives and how its proposal would achieve these objectives. General information concerning the Respondents' qualifications, described in further detail in Section III above, should be included in the Executive Summary.

3. Company References

Respondent must provide a minimum of three (3) references, preferably at least one from an educational institution, not-for-profit or nonprofit organization related to a project of similar scope and magnitude.

4. Business License/Authority to do Business in Illinois

Respondent must provide copies of appropriate licenses or certifications required of any individual or entity selling products and any related services as described in this RFP in the City of Chicago, County of Cook, and State of Illinois, for itself, its partners and its subcontractors, including evidence that Respondent is authorized by the Secretary of State to do business in the State of Illinois.

5. Key Personnel and Organization

Provide the names of key individuals for this effort, as well as an organization chart representing project responsibilities. For each key individual identified, provide the following information:

- a. Title and reporting responsibilities;
- b. Proposed role in this program, including the functions and tasks for which they will have primary responsibility;
- c. Pertinent areas of expertise and past experience; and
- d. Resumes or corporate personnel profiles which describe their overall experience and expertise.

6. Scope

Respondent must provide a comprehensive plan for implementing the Scope of Services outlined in this RFP. Each Respondent will be evaluated on its professional experience, delivery timetable, and approach to meeting UNO requirements.

7. Price Proposal

Respondents must provide information regarding the proposed price schedule for the goods or services. Proposals that fail to include complete price information will be deemed non-responsive and rejected. UNO reserves the right to negotiate a final fixed price, terms, and conditions with the selected Respondent. The price you quote should be inclusive of all charges and fees. If your price excludes certain fees or charges, Respondent is responsible for disclosing any charges or fees that UNO in a detailed list of excluded fees with an explanation of the nature of those fees.

8. Minority and Women Owned Business Enterprise Commitment

UNO encourages Respondents to use best efforts to use minority and women-owned businesses in relation to the products to be provided under this solicitation. Please state if your firm is certified as a MBE, WBE, or DBE and provide any and all supporting documentation.

V. SUBMITTING PROPOSALS

A. Proposal Due Date, Time and Email Submission Address

All proposals **must be submitted by 12:00 p.m. (Central) on May 11, 2016**. All Proposals must be submitted **by email** to unobidresponse@uno-online.org. Only proposals submitted to this email account will be considered.

This RFP and the resulting evaluation of proposals is an open and competitive process. UNO staff will not open Proposals until after the due date and time specified above. For that reason, it is important that Respondents ensure that proposals that are submitted are submitted completely and accurately.

Prior to the due date, you may email modifications and withdrawals to the email address specified above. No other methods of delivery will be accepted. We must receive submissions as specified; it is not sufficient to show you mailed or commenced delivery before the due date and time. We will not consider Proposals, modifications or withdrawals submitted after the due date and time.

B. Question and Answer Period

UNO shall post any supplemental information or answers to questions received by potential vendors on its website by 5:00 pm CST on **Wednesday, May 18, 2016**. All questions must be received by the contact listed below by no later than NEEDS ACCURATE DATE

Only written answers to questions shall be binding on UNO. Questions and answers to regarding this RFP will be posted to the UNO website at www.uno-online.org.

C. Addenda

Respondents may download the RFP and any future addenda from the UNO website at the following URL address: www.uno-online.org.

Respondents are solely responsible for acquiring the necessary information and materials. Under no circumstances shall the failure to obtain clarifications and/or addenda relieve a Respondent from being bound by any additional terms and conditions in the clarifications and/or addenda, or from considering additional information contained therein in preparing a Proposal. Furthermore, failure to obtain any clarification and/or addendum shall not be valid grounds for a protest against award(s) made under this RFP.

D. Contact Information

If you have a question you should notify the Project Contact identified in this section. Do not discuss the solicitation or your proposal, directly or indirectly, with any UNO officer, director or employee other than the Project Contact (see the section captioned "Quiet Period" below). Questions regarding this RFP must be sent in writing via email to the Project Contact. Telephone calls regarding the solicitation are not permitted. The contact information of the Project Contact is as follows:

Solskin Gomez-Krogh
Email: sgomezkrogh@uno-online.org
1655 S. Blue Island, 3rd Floor
Chicago, IL 60608

VI. ADDITIONAL CONDITIONS

E. Quiet Period

The Quiet Period is intended to establish guidelines by which Directors and UNO staff and contractors will communicate with prospective vendors during the pendency of a solicitation. The objectives of such a Quiet Period are to ensure that prospective vendors competing for contracts with UNO have equal access to information regarding selection parameters and to ensure that the process of selecting vendors is transparent, efficient, diligent and fair. The following guidelines will be instituted during the pendency of solicitations issued by UNO:

1. A quiet period will commence upon the issuance of a solicitation by UNO and/or UNO staff or contractors and end upon award of any resulting contracts from the subject solicitation.
2. Initiation, continuation and conclusion of the quiet period shall be publicly communicated to prevent inadvertent violations
3. All Directors, UNO staff and its contractors, other than the previously-identified Project Contact, shall refrain from communicating with potential vendors regarding any product or service related to any pending solicitation throughout the quiet period and shall refrain from accepting meals, travel, hotel or other value from the potential vendors.
4. Throughout the quiet period, if any Director is contacted by a potential vendor, the Director shall refer the vendor to the General Counsel or Project Contact.
5. The quiet period does not prevent UNO from performing due diligence or communicating with an existing vendor that happens to be a competing vendor in the ordinary course of services provided by such vendor; however, discussions related to the pending selection shall be avoided during such activities.
6. A potential vendor may be disqualified from consideration under the solicitation for a knowing violation of this quiet period policy.

By submitting a Proposal, a Respondent thereby certifies that the Respondent has complied with the quiet period policy, as described above.

F. Proposal Firm Time

Your Proposal must remain firm for 180 days from opening (the "Proposal Firm Time").

G. Conflicts of Interest

UNO will consider any information, including information contained in Respondent's Proposal that may demonstrate a conflict or potential conflict of interest that might compromise Respondent's ability to successfully perform the proposed services or undermine the integrity of the competitive procurement process.

UNO's officers, directors, agents, employees and family members are prohibited from engaging in any activity or transaction that conflicts with or appears to conflict with the interests of the Organization. Accordingly, Respondents must disclose any personal, professional or business

relationship it has or has had with UNO, any of its employees, its Board members, or family members of UNO employees or Directors that could give rise to, or appear to give rise to, a conflict of interest.

If any Respondent submitting a Proposal has provided any services to UNO in researching, consulting, advising, drafting or reviewing this solicitation or any other services related to the preparation of this solicitation, such Respondent will be disqualified from further consideration. By submitting a Proposal, a Respondent thereby certifies that the Respondent does not have a conflict of interest that would prevent the award of a contract in accordance with UNO's procurement policy.

The term "conflict of interest" is any transaction in which any of UNO's or UNO's officers, directors, agents, employees and family members use their position for a purpose that is, or gives the appearance of being, motivated by a desire for private gain, financial or nonfinancial, for themselves or others, particularly those with whom they have family business or other ties.

H. Procurement Policy Compliance/Rescission of Resulting Contract

UNO requires strict adherence to its Procurement Policy, a copy of which will be made available to Respondent upon request. By submitting a bid, Respondent understands that the information furnished to UNO during the procurement process, including without limitation the disclosure of any conflicts of interest, certifications regarding communications with UNO relating to the Quiet Period, or certifications relating to UNO's ban on pre-solicitation assistance, is material to its decision to award the Selected Respondent a contract. Respondent agrees that any misstatement of fact or omission made or not made in responding to this IFB may be grounds for rescinding the resulting contract.

I. Confidentiality

Respondent may identify those portions of the Proposal that contain trade secrets or other proprietary data that must remain confidential. If a Respondent includes data that is not to be disclosed to the public for any purpose or used by UNO for anything other than evaluation purposes, the Respondent must:

1. Mark the title page as follows: "This RFP Proposal includes trade secrets or other proprietary data ("data") that may not be disclosed outside UNO and may not be duplicated, used or disclosed in whole or in part for any purpose other than to evaluate this Proposal. The data subject to this restriction are contained in sheets (insert page numbers or other identification)."
2. Mark each sheet or data to be restricted with the following legend: "Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this Proposal."

To the extent that Proposals received as a result of the RFP are subject to disclosures required by law, including disclosures under the Freedom of Information Act, the Proposals will be open to the public unless the Respondent requests in its Proposal that the state treat certain information as confidential. A request for confidential treatment will not supersede the legal obligations imposed by state or federal laws.

UNO will not honor requests to keep the entire Proposal confidential, and the Respondent must show

specific grounds or rules that support confidential treatment. If a Respondent requests confidential treatment, the Respondent must submit one (1) additional copy of the Proposal with the confidential information redacted. Respondents shall include in the redacted copy a description of the information redacted. By separate attachment to the un-redacted Proposal, Respondent must list the information to receive confidential treatment and the section and page number of the Proposal on which it appears. Nothing herein shall obligate UNO to withhold information subject to disclosures required by law. A Respondent must hold harmless and indemnify UNO for all costs or damages associated with UNO defending Respondent's request for confidential treatment.

J. Governing Law and Forum

Illinois law and rules govern this solicitation and any resulting contract. You must bring any action relating to this solicitation or any resulting contract in the appropriate court in Illinois.

K. Award Notices

UNO will post a notice to the UNO website identifying the apparent awardee(s). The notice extends the Proposal Firm Time until we sign a contract or determine not to sign a contract. We may accept or reject your Proposal as submitted, or may require contract negotiations. If negotiations do not result in an acceptable agreement, we may reject your Proposal and begin negotiations with another Respondent to the RFP.

L. Additional Conditions

By submitting a Proposal, it is understood that the entity submitting the selected proposal shall perform all services and functions required in this RFP. The services contemplated are professional in nature. It is understood that the selected entity must be of professional status, licensed to for all applicable professional discipline(s) requiring licensing, and in good standing with its state of incorporation, if applicable. The Respondent and each of its members, employees, agents, or subcontractors must be financially solvent and competent to perform the services required under this RFP document. Subcontractors will be subject to the same standards, duties, and disclosures as the selected entity.

Further, it is understood that all proposals that would require the submitting entity to hire or engage subcontractors to carry out the proposed services must clearly identify such subcontractors and the work they will perform. Please provide the name, address, and EIN of any known subcontractors. UNO will not refuse a proposal based upon the use of subcontractors. However, we retain the right to refuse the subcontractors you have selected if the use of such subcontractors would violate the procurement policies of UNO.

Further, it is understood that all reports, information, or data prepared or assembled by the selected entity under a contract awarded pursuant to this RFP are confidential in nature and will not be made available to any individual or organization without the prior written approval of UNO.

M. Contract Terms

By submitting a response to this RFP, you are acknowledging that if your Proposal is accepted by UNO, your Proposal and related submittals may become part of the contract. UNO will negotiate contract terms upon selection. If a contract has been accepted as an addendum to this RFP,

Respondents will be expected to provide any comments on the terms and conditions of the contract to UNO at the time the Proposal is submitted.

UNO reserves the right to refuse an award of a contract to any entity submitting a proposal based on a failure to agree to terms and conditions that are in the best interest of UNO and its affiliates. If a selected entity is refused an award of a contract, UNO reserves the right to select any other entity submitting a proposal in response to this RFP for such an award.

N. Reservation of Rights

UNO reserves the right to:

1. Reject any or all of the Proposals, including the lowest price proposal;
2. Issue a subsequent RFP;
3. Withdraw the entire RFP;
4. Remedy errors in the RFP;
5. Seek the assistance of outside technical experts to review proposals;
6. Approve or disapprove the use of particular subcontractors and suppliers;
7. Award a Contract to one or more Respondents;
8. Waive informalities and irregularities in Proposals; or
9. Disqualify the proposal(s) upon evidence of collusion with intent to defraud or other illegal practices on the part of Respondent(s).

EXHIBIT A – REQUIRED DISCLOSURES AND CERTIFICATIONS

UNITED NEIGHBORHOOD ORGANIZATION RESPONDENT DISCLOSURES AND CERTIFICATIONS

By submitting a Proposal in response to this RFP, the undersigned acknowledges and agrees that compliance with the terms of this document is required before the Respondent will be identified as the Selected Respondent. Respondent acknowledges that compliance with the terms shall also be a material requirement and condition for the entire term of any resulting contract. Respondent agrees to execute this exhibit and return it to UNO as an attachment to its Proposal. Respondent acknowledges that the certifications and disclosures in this exhibit shall apply to any subcontractor or lower tier participant used to provide products on Respondent's behalf if Respondent's Proposal is selected. All subcontractors used to perform services will be required to disclose and certify to the same extent at the time of entering into an agreement to provide goods or services with the Respondent. Respondent acknowledges that it shall be responsible for ensuring such disclosures and certifications are made.

Respondent acknowledges and agrees that any party that provides false information or fails to comply with the disclosures and certifications below may be subject to denial of payment, suspension, or debarment.

1. If the Respondent plans to use subcontractors, the Respondent shall include by attachment the names of all subcontractors, their addresses, descriptions of work to be performed by the subcontractors, and anticipated amounts of payments to subcontractors.
2. Respondent certifies that no director, officer, or employee UNO has a direct or indirect financial interest in Respondent, defined as an ownership or investment interest in or compensation arrangement with or potential ownership or investment interest in or compensation arrangement with the Respondent or its affiliates. If such an interest exists, Respondent certifies that it will disclose, by attachment, the nature of the financial interest, including the identity of the director, officer, or employee, and all material facts so that UNO can determine if a conflict of interest exists in accordance with its established policies.
3. Respondent certifies that it will disclose any familial relationship—meaning, whether by blood or adoption, parent, child, sibling, aunt or uncle, niece or nephew, grandparent, grandchild, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepfather or stepmother, stepson or stepdaughter, stepbrother or stepsister that exists between itself, its directors, or officers and any director, officer, or employee of UNO .
4. Respondent certifies that it, its principals and its employees:
 - a. Are not carrying out a romantic or sexual relationship with any director, officer or employee of UNO;
 - b. Are not presently declared ineligible, debarred, suspended, proposed for debarment, or voluntarily excluded from contracting with any Federal or State department or agency;

- c. Have not within a five-year period preceding the submittal of the Proposal been convicted of any felony, been convicted of a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; had a civil judgment rendered against them for the commission of fraud; been found in violation of Federal or State antitrust statutes; or been convicted of embezzlement, theft, larceny, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property; and
- d. Are not presently indicted, under investigation, or otherwise charged by a government entity (Federal, State, or local) with commission of any of the offenses listed above.

5. Respondent certifies that it shall comply with any and all federal, state and local laws, statutes, ordinances, rules, regulations and executive orders that are now or may be in effect during the term of an agreement between the Respondent and UNO resulting from this RFP.

6. Respondent certifies that neither it nor any agents nor affiliated entities have colluded with other bidders or prospective bidders, or been a party to any such agreement to collude, or been convicted or adjudged guilty of agreement or collusion among bidders or prospective bidders, in restraint of freedom of competition by agreement to bid a fixed price or otherwise.

7. Respondent certifies that neither it nor any agents nor affiliated entity nor any employee, official, agent or partner, is barred from contracting with any unit of state or local government as a result of engaging in or being convicted of bid-rigging in violation of 720 ILCS 5/33E-3 or bid-rotating in violation of 720 ILCS 5/33E-4.

9. Respondent certifies that it will provide immediate written notice to UNO if, at any time, it learns that its certifications or the certifications of any subcontractor or other lower tier participant were erroneous or misleading when submitted or has become erroneous or misleading by reason of changed circumstance.

10. Respondent acknowledges that the disclosures and certifications herein are a material representation of fact upon which reliance will be placed when entering into an agreement with the Selected Respondent.

11. Respondent certifies that it is not barred from entering into a contract that results from the selection of its Proposal as a result of providing assistance to UNO in identifying a need for the goods or services described in the Description of Services in the RFP.

12. To the extent that a contract awarded as a result of this RFP uses public funds, Respondent certifies that it will comply with the federal and state laws relating to discrimination, including without limitation the Illinois Department of Human Rights Act and rules applicable to public contracts, which include providing equal employment opportunity, refraining from unlawful discrimination, and having written sexual harassment policies.

By signing below, Respondent certifies, to the best of his or her knowledge and belief, that the foregoing statements are true and accurate as of the date affixed to the signature below.

RESPONDENT

Signature

Date

Name

Title

Organization