Attachment E: Responsive Proposal Checklist

CACO

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- ☐ **Transmittal Letter <u>signed, at a minimum, by the primary contact you have identified in your proposal.</u>**
- ☐ **Your Proposal***, with clearly labeled sections for:*
  - ☐ **Offeror Identification**
  - ☐ **Criterion 1: Proposed Use**
  - ☐ **Criterion 2: Improvements, Maintenance, and Preservation of the Historic Quality of the Property**
  - ☐ **Criterion 3: Financial Capability of the Offeror**
  - ☐ **Criterion 4: Demonstrated Experience**
  - ☐ **Criterion 5: Environmental Enhancement**
  - ☐ **Criterion 6: Financial and Other Terms Offered**
- ☐ **<u>Form 10-352 Business History Information Form</u>.** If your organization is or will be comprised of multiple individuals or entities, you should provide a 10-352 Form for each.
- ☐ *Depending on the nature of your organization, one of the following:*
  - ☐ **<u>Form 10-353 Offeror Information: Individual or Sole Proprietorship</u>**, include separate forms for the submitting individuals, or sole proprietor business entities, or parent entities, if relevant
  - ☐ **<u>Form 10-354 Business Offeror Information: Corporation, Limited Liability Company, Partnership, or Joint Venture</u>,** include separate forms for the submitting business entity and any and all parent entities
- ☐ **<u>Form 10-355A Offeror Financial Statements and Projections: Small Leases</u>**, and all requested attachments and supporting documentation
  - ☐ *Including, one of the following:*
    - ☐ *If this is for an existing business entity:*
      - ☐ Audited or reviewed income statements for the two most recent fiscal years
      - ☐ Balance sheets for:
        - ☐ The most recent fiscal year
        - ☐ A sheet from the end of the most recent month prior to the submission of your proposal.
      - ☐ Earnings, bank, or investment account statements that substantiate the information provided in your Business Financial Statement
      - ☐ A credit report for the Business Entity, **with credit score**, from within the last 30 days
    - ☐ *If this is for a new business entity created for this opportunity:*
      - ☐ Personal Financial Statements for all the principals of the organization, that identifies total assets, liquid assets, and financial liabilities
      - ☐ Earnings, bank, or investment account statements that substantiate the information provided
      - ☐ Credit reports for all the principals of the organization, **with credit scores,** from within the last 30 days
    - ☐ *If this is for a Sole Proprietor or Individual:*
      - ☐ A Personal Financial Statement that identifies your total assets, your liquid assets and your financial liabilities
      - ☐ Earnings, bank, or investment account statements that substantiate the information provided your Personal, and or, Business Financial Statements.
      - ☐ A credit report for the Sole Proprietor or Individual (and Business if available), **with credit score**, from within the last 30 days

Please review the credit report you provide carefully, many of the free annual credit reports that are available do not include a credit score.