

RFP SPECIFICATIONS

FOR

Jacksonville Housing Finance Authority

Professional Services: FINANCIAL ADVISOR

RFP 2025-01

OPEN DATE: Friday, June 6, 2025

TIME: 2:00 P.M.

PLACE: 14102 Lynn Road, Poplar Bluff, MO 63901

Contact Information:

Jacksonville Housing Finance Authority Controller
LauraStagner@StagnerAnderson.onmicrosoft.com

14102 Lynn Road
Poplar Bluff, MO 63901
(904) 993-0476

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RESPONSE FORM

Jacksonville Housing Finance Authority

DATE:

BID NO.

RFP 2025-01

THIS FORM MUST BE SIGNED AND INCLUDED IN RESPONSE SUBMISSION							
<p><u>CONTRACTOR NAME AND ADDRESS:</u></p> <p>FID/SSN # _____</p>	<p>Bid to be submitted before 2:00 P.M. to 14102 Lynn Road, Poplar Bluff, MO 63901</p> <p>This proposal will be opened Friday, June 6, 2025 at 2:00 P.M.</p> <p>14102 Lynn Road, Poplar Bluff, MO 63901</p> <p>Responses to the RFP must be typewritten and must also include a PDF of the proposal.</p> <p>Buyer: Laura Anderson Phone: (904) 993-0476</p>						
<p><u>RESPONSE SECURITY REQUIREMENTS:</u></p> <p>None Required</p>	<p><u>AGREEMENT TERM/RENEWALS:</u></p> <p>The initial term of agreement will commence upon execution of the Contract and will continue for two (2) years, with two (2) two-year options to renew. The Contract may be subject to early termination as set forth elsewhere in this RFP.</p>						
<p><u>SAMPLE REQUIREMENTS:</u></p> <p>None Required</p>	<p><u>PERFORMANCE BOND:</u></p> <p>None Required</p>						
<p><u>QUANTITIES:</u></p> <p>None listed</p>	<p><u>FOR TECHNICAL INQUIRIES, CONTACT:</u></p> <p>All questions are to be submitted to the Controller in writing at:</p> <p>LauraStagner@StagnerAnderson.onmicrosoft.com</p>						
<p>Department: Jacksonville Housing Finance Authority</p>							
<p>Scope: Furnish all labor, materials, and equipment necessary as described by the Terms & Conditions, Special Conditions, & Specifications herein.</p>							
<p>Proposers Certification</p>							
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	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border-bottom: 1px solid black; height: 30px; width: 55%;"></td> <td style="border-bottom: 1px solid black; height: 30px; width: 20%;"></td> <td style="border-bottom: 1px solid black; height: 30px; width: 25%;"></td> </tr> <tr> <td style="text-align: center; font-size: small;">Print Individual's Name & Title</td> <td style="text-align: center; font-size: small;">Phone Number</td> <td style="text-align: center; font-size: small;">Email Address</td> </tr> </table>				Print Individual's Name & Title	Phone Number	Email Address
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Proposers are to submit One signed original AND Three copies of the entire response and labeled accordingly. Proposers are also required to submit a PDF of the response via email or on a thumb drive or other storage device. All PDFs must be of a size/resolution that can be emailed. Please limit RFP responses to 20 pages.

GENERAL CONDITIONS

1. RESERVATIONS: The Jacksonville Housing Finance Authority ("JHFA" "Authority" or "Board") reserves the right to reject any or all proposals or any part thereof and/or to waive information if such action is deemed to be in the best interest of the JHFA.

The JHFA reserves the right to cancel any contract, if in its opinion, there be a failure at any time to perform adequately the stipulations of this request for proposal ("RFP"), and the general conditions and specifications which are attached and made part of this RFP, or in any case of any attempt to willfully impose upon the JHFA materials or products or workmanship which is, in the opinion of the JHFA, of an unacceptable quality. Any action taken in pursuance of this latter stipulation will not affect or impair any rights or claim of the JHFA for damages for the breach of any covenants of the contract by the contractor. The JHFA also reserves the right to reject the proposal of any proposer who has previously failed to perform adequately after having once been awarded a prior RFP for furnishing materials similar in nature to those materials mentioned in this RFP.

Should the contractor fail to comply with the conditions of this contract or fail to complete the required work or furnish the required materials within the time stipulated in the contract, the JHFA reserves the right to purchase in the open market, or to complete the required work, at the expense of the contractor or by recourse to provisions of the faithful performance bond if such bond is required under the conditions of this RFP.

Should the contractor fail to furnish any item or items, or to complete the required work included in this contract, the JHFA reserves the right to withdraw such items or required work from the operation of this contract without incurring further liabilities on the part of the JHFA thereby.

SHOULD ANY PROPOSER HAVE ANY QUESTIONS AS TO THE INTENT OR MEANING OF ANY PART OF THIS RFP THEY SHOULD CONTACT THE JHFA IN TIME TO RECEIVE A WRITTEN REPLY BEFORE SUBMITTING ITS RESPONSE.

JHFA reserves the right to terminate the Contract or Purchase Order at any time and for any reason by giving written notice to Contractor unless otherwise specified within the solicitation documents. If the Contract or Purchase Order is terminated for convenience as provided herein, JHFA will be relieved of all further obligations other than payment for that amount of Goods or Services actually provided to the date of termination.

2. QUOTATIONS: No proposer will be allowed to offer more than one price on each item even though he/she may feel that he/she has two or more types or styles that will meet specifications. Proposers must determine for themselves which to offer. IF SAID THE PROPOSER SHOULD SUBMIT MORE THAN ONE PRICE ON ANY ITEM ALL PRICES FOR THAT ITEM WILL BE REJECTED AT THE DISCRETION OF THE JHFA CONTROLLER.

3. COLLUSION: THE PROPOSER, BY AFFIXING HIS/HER SIGNATURE TO THIS PROPOSAL AGREES TO THE FOLLOWING: "PROPOSER CERTIFIES THAT THIS BID IS MADE WITHOUT ANY PREVIOUS UNDERSTANDING, AGREEMENT OR CONNECTION WITH ANY PERSON, FIRM, OR CORPORATION MAKING A BID FOR THE SAME ITEMS; AND IS IN ALL RESPECTS FAIR, WITHOUT OUTSIDE CONTROL, COLLUSION, FRAUD OR OTHERWISE ILLEGAL ACTION."

4. ERRORS IN BIDS: Proposers or their authorized representatives are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting proposals; failure to do so will be at the proposer's own risk and he/she cannot secure relief on the plea of error. Neither law nor regulations make allowance for errors either of omission or commission on the part of proposers. In case of error in extension of prices in the proposal, the unit price will govern.

5. OFFICE OF INSPECTOR GENERAL: The City of Jacksonville has established an Office of Inspector General, Section 602.310, Part 3, Chapter 602, *Ordinance Code*, as may be amended. The Inspector General's authority includes but is not limited to the power to: review past, present, and proposed City contracts, transactions, accounts, and records; require the production of records; and, audit, investigate,

monitor, and inspect the activities of the City, its officials, employees, contractors, their subcontractors and lower tier subcontractors, and other parties doing business with the City and/or receiving City funds in order to ensure compliance with contract requirements and detect corruption and fraud. Failure to cooperate with the Inspector General or interfering with or impeding any investigation shall be a violation of Section 602.309, *Ordinance Code*.

6. ETHICS PROVISION FOR VENDORS/SUPPLIERS: The proposer, by affixing its signature to the proposal form, and/or the acceptance of a purchase order, represents that it has reviewed the provisions of the Jacksonville Ethics Code contained in chapter 602, Jacksonville Ordinance Code and the provisions of the Purchasing code contained in chapter 126, Jacksonville Ordinance Code.

7. NONDISCRIMINATION PROVISIONS: As required by Section 126.404, Jacksonville Ordinance Code, contractor represents that it has adopted and will maintain throughout the term of this contract a policy of nondiscrimination or harassment against any person with regard to race, color, sex (including pregnancy), sexual orientation, gender identity or expression, religion, political affiliation, national origin, disability, age, marital status, veteran status, or any other impermissible factor in recruitment, hiring, compensation, training, placement, promotion, discipline, demotion, transfers, layoff, recall, termination, working conditions and related terms and conditions of employment. Contractor agrees that, on written request, it will permit reasonable access to its records of employment, employment advertisement, application forms and other pertinent data and records, by the Executive Director of the Community Relations Commission, or successor agency or commission, for the purpose of investigation to ascertain compliance with the non-discrimination provisions of the Contract; *provided however*, that Contractor shall not be required to produce, for inspection, records covering periods of time more than one (1) year prior to the effective date of the Contract. Contractor agrees that, if any of the products or Services to be provided pursuant to the Contract are to be provided by a subcontractor, the provisions of this Section shall be incorporated into and become a part of the subcontract.

8. LEGAL WORKFORCE: Bidder shall consider the employment, by Vendor/Contractor, of unauthorized aliens a violation of section 274A(e) of the Immigration and Nationality Act. Such violation shall be cause for unilateral cancellation of the contract upon thirty (30) days' prior written notice of such cancellation, notwithstanding any other provisions to the contrary in the Specifications and other Contract Documents.

Contractor shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

- a. all persons employed by the Contractor during the term of the Contract to perform employment duties within Jacksonville, Duval County, Florida; and
- b. all persons, including subcontractors, assigned by the Contractor to perform work pursuant to the Contract with the Proposer.

9. LICENSES REQUIREMENT: Proposers responding to a solicitation or by acceptance of a Purchase Order issued by the JHFA agree to obtain and maintain all applicable Local, State and Federal licenses required by law.

SUPPLEMENTAL CONDITIONS

1. SUBMISSION OF BIDS:

All proposals must be submitted no later than the designated proposal opening date and time as specified in the RFP documents.

Submit proposals to:
Jacksonville Housing Finance Authority
c/o Laura Anderson
14102 Lynn Road
Poplar Bluff, MO 63901

Proposers are fully responsible for delivery of proposals. Reliance upon mail or public carrier is at the proposer's risk.

Proposers are to submit One signed original AND Three copies of the entire response and labeled accordingly. Proposers are also required to submit a PDF of the response via email or on a thumb drive or other storage device.

LATE PROPOSALS ARE NOT CONSIDERED.

Respond to this RFP only on the response/proposal form(s) supplied herewith. Any changes or alterations must be initialed by the person signing the proposal.

Proposers' signature on the Bid Form signifies that the proposer has familiarized him/herself with all the Terms and Conditions of this RFP, and agrees to them all, and that his/her proposal is made and submitted for the items as specified and detailed herein unless exceptions are clearly noted and that the prices quoted herein are firm for the duration of this RFP. Failure to submit a signed Response/Proposal Form with proposal submission will be grounds for proposal rejection. Violations of any of the Terms and Conditions of this RFP and delivery time stated can result in the Proposer's suspension from all bid lists of the JHFA.

Please write your RFP number and open date on the outside of the sealed envelope. Failure to do so may result in your proposal being returned unopened.

2. PROPOSAL OPENING AND TABULATION:

As applicable, due to the large number of proposals to be opened, and the numerous items contained in some proposals, such proposals may not be tabulated at the proposal opening. Proposals may be reviewed by arrangement with the respective proposer. Proposers desiring a copy of the tabulation sheet and the award recommendation must include a self-addressed, stamped envelope with the proposal. If a copy of the tabulation sheet is desired prior to award, then two (2) self-addressed, stamped envelopes must be included.

BID RESULTS AND AWARD RECOMMENDATIONS WILL NOT BE GIVEN BY TELEPHONE

3. PUBLIC ENTITY CRIME INFORMATION:

A person or affiliate who has been placed on the State of Florida convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity for a period of 36 months from the date of being placed on the convicted vendor list.

4. AUDIT PROVISION:

A person or entity providing capital improvements, contractual services, supplies, professional design services, or professional services purchased by the JHFA pursuant to a method of purchase, unless

otherwise provided herein, shall agree and be deemed to have agreed by virtue of doing business under contract with the JHFA to all access and examination at all reasonable times by the Council Auditor or any duly authorized representative of the Council Auditor to business records directly pertinent to the transaction until the expiration of three years after final payment pursuant to the transaction. No examination shall be conducted until the Council Auditor has made a recommendation to the Council President that the examination should or, in the alternative, should not be conducted and until the Council President has approved the conducting of the examination.

6. **W-9 REQUIREMENT:**

All proposers are required to submit with their proposal submission a W-9. It is the vendor's responsibility to ensure that the JHFA has a current W-9 on file.

7. **SOLICITATION SILENCE POLICY:**

The JHFA has implemented a Solicitation Silence Policy that prohibits certain oral communication regarding a solicitation during the period the policy is in effect. Written communications to the JHFA Controller are allowed at all times.

Prohibitions

Any oral communication regarding a particular solicitation is prohibited between a potential vendor, service provider, proposer, lobbyist or consultant and JHFA Board members or hired consultants.

Exceptions to the Solicitation Silence Policy

Unless specifically provided in the applicable solicitation document the Solicitation Silence Policy does not apply to the following:

- communications regarding a particular solicitation between the JHFA Controller responsible for administering the procurement process for such solicitation, provided the communication is limited strictly to matters of process or procedure already contained in the corresponding solicitation document.
- communications with the Office of General Counsel and his/her staff
- emergency procurements of goods and services pursuant to Chapter 126.102(e)
- oral communications at pre-bid conferences
- oral presentations before publicly noticed committee meetings.
- contract negotiations during any duly noticed public meeting.
- communications in writing at any time to the JHFA Controller unless specifically prohibited by the applicable solicitations document.

Commencement and Termination of the Solicitation Silence Period

The period of Solicitation Silence commences after the advertisement of the solicitation document. The period of Solicitation Silence terminates after the JHFA Controller or JHFA Board Committee issues a written recommendation to the JHFA Board.

Written Communication during the Solicitation Silence Period

When the Solicitation Silence period is in effect, any communication shall be in writing, unless one of the exceptions applies. Written communication may be in the form of a letter or email.

If Not an Exception

If an oral inquiry calls for an answer or response that is not within the scope of the exception, kindly request that the question be presented in writing to the JHFA Controller and that a response will, in turn, be given.

CONFLICT OF INTEREST CERTIFICATE

Proposer must execute either Section I or Section II hereunder relative to Florida Statute 112.313(12). Failure to execute either section may result in rejection of this proposal.

SECTION I

I hereby certify that no official or employee of the City or JHFA requiring the goods or services described in these specifications has a material financial interest in this company.

Signature

Company Name

Name of Official (type or print)

Business Address

City, State, Zip Code

SECTION II

I hereby certify that the following named City officials(s) and/or employee(s) and/or JHFA official having material financial interest(s) (in excess of 5%) in this company have filed Conflict of Interest Statements with the Supervisor of Elections, 105 East Monroe Street, Jacksonville, Duval County Florida, prior to bid opening.

Name	Title of Position	Date of Filing

Signature

Company Name

Name of Official (type or print)

Business Address

City, State, Zip Code

PUBLIC OFFICIAL DISCLOSURE

Section 126.110 of the Purchasing Code requires that a public official who has a financial interest in a bid or contract make a disclosure at the time that the bid or contract is submitted or at the time that the public official acquires a financial interest in the bid or contract. Please provide disclosure, if applicable, with bid.

Public Official _____

Position Held _____

Position or Relationship with Proposer _____

INDEMNIFICATION & INSURANCE

1.00 INDEMNIFICATION:

- 1.01 The Contractor, its employees, agents and subcontractors shall indemnify, defend and hold harmless the City, the JHFA and/or its using agencies named in the contract documents, its directors, officers, agents, representatives and employees, from and against any damages, liabilities, losses and costs, including but not limited to reasonable attorneys' fees to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Contractor, and other persons employed or utilized by the Contractor in the performance of this contract or the work performed thereunder.
- 1.02 This indemnification is separate and apart from, and in no way limited by, any insurance provided pursuant to this contract or otherwise.

2.00 INSURANCE:

- 2.01 The Contractor shall provide insurance as detailed in the minimum qualifications section of this RFP.

SCOPE OF SERVICES & SELECTION PROCESS

1. SCOPE, BACKGROUND, AND INVITATION:

The Jacksonville Housing Finance Authority ("JHFA") requires a Financial Advisor to provide the services listed below.

2. MINIMUM REQUIREMENTS:

Proposers must satisfy the following mandatory minimum requirements in order to have their responses evaluated. By submitting a response, Proposer warrants and represents that it satisfies these requirements. Failure to meet these requirements may result in the response not being evaluated and being rejected as non-responsive:

- Authorized and licensed under Florida Statutes to perform the professional services sought by this RFP.
- Meets professional qualification requirements under the Municipal Securities Rulemaking Board (MSRB) rules
- The proposed personnel to be assigned must have a minimum of 5 years' experience in the provision of financial advisory services
- Submit a detailed fee schedule
- Submit three references from Proposer's clients where comparable scope of work described and sought by this RFP has been performed.
- Professional liability insurance in amount to be negotiated with Proposer who is selected

3. DELIVERABLES:

1. Attend monthly meetings and special meetings of the JHFA, JHFA subcommittee meetings and, on an as-needed basis attend any meetings of the City Council or its committees;
2. As needed, consult with members of the JHFA and its staff, and bond counsel, underwriters, trustee and other providers of professional services or consulting services;
3. Review, analyze and make recommendations with respect to housing proposals made to the JHFA by developers, non-profit community groups or others;
4. Provide information and advice to the JHFA from time to time concerning the JHFA's investment of available funds, general economic conditions, housing market conditions, and proposed tax law changes;
5. Draft MF handbook and Application and update as appropriate, evaluate all MF Applications for bonds and gap loans, coordinate credit underwriter reports with credit underwriters, evaluate monthly occupancy reports and maintain detailed occupancy reports and charts by project, evaluate monthly servicing reports, evaluate demographics both single family and multifamily programs with monthly reports to Board, monitor FHFC activities as they relate to Jacksonville HFA and prepare comments for Board in conjunction with HFA rulemaking, develop and modify investment policy.
6. Provide information, advice and assistance to the JHFA from time to time in its general operations concerning matters that may affect the interests of the JHFA.
7. Prepare Board Agenda and Monthly Board Packages, prepare Minutes for Board members approval, coordinate Quorum for Board Meeting, maintain Board contact information, register Board members for conferences and arrange for travel, work with CPA and Finance Staff to collect and submit monthly financial information to Board members, coordinate TEFRA notices and notices for public hearings, maintain HFA membership in affiliate organizations.

8. Oversees and coordinates the various activities of the contracted Controller to maintain and provide accurate and timely financial reporting to the Board of Directors, including preparation of the Authority's annual report.
9. Analyze the financial and the other economic factors relating to the JHFA and issuance of the proposed bonds
10. Determine if the JHFA should proceed with any plan to issue such bonds based upon the JHFA's bonding authority, bond volume cap allocation, time schedule, available revenues and similar related factors.
11. Provide advice to the JHFA regarding the feasibility of the various financing methods available in the issuance of bonds, and if feasible, to provide advice and recommendations to the JHFA as to the most advantageous method of structuring the financing and the marketing of the bonds, such as sale of bonds (or notes) by competitive bidding or negotiated sale.
 - (a) If competitive bidding is advised, assist the JHFA and bond counsel in preparing the notice of bond sale, bid form and preliminary and final Official Statements.
 - (b) If a negotiated sale is advised, make recommendations as to the number of underwriters that should be used to assure an optimum sale of the bonds, recommend whether to accept or reject the offer of the underwriters, and review the preliminary and final Official Statements prepared by the underwriters.
12. Services if the bond issue is determined to be feasible and is authorized by the JHFA.
 - (a) Meet with representatives of the JHFA and with the parties designated for such purposes by the JHFA at all reasonable times after reasonable notice.
 - (b) Recommend the necessary provisions and covenants of the JHFA to be contained in the bond resolutions including but not limited to bond amounts, dates, maturities, interest rates, redemption provisions, flow of funds, debt service coverage requirements, reserve funds, rates and charges, security pledges and conditions relating to the issuance of any additional bonds.
 - (c) Coordinate work with the JHFA's attorney and bond counsel regarding the financial and security provisions to be contained in the instruments authorizing and securing the bonds and to attend hearings and otherwise assist, to the extent reasonable, necessary and proper, in matters required by administrative, judicial, legislative and other governmental bodies, including testimony, exhibits and services as an expert witness in the proceedings to validate the bonds.
 - (d) Assist the JHFA in selection of underwriter(s) and method of allocation of bonds.
 - (e) Prepare any necessary illustrations, charts, graphic presentations and other information of use to the public, underwriters and potential investors.
 - (f) Prepare information necessary to obtain a favorable bond rating and, if necessary, make presentation of this information to the bond rating organizations.
 - (g) Assist in the preparation of the Preliminary and final Official Statement and distribute the same to potential underwriters, rating agencies and large investors. The official Statement

should be presented in a form familiar to bond underwriters and should include but is not limited to the following:

- (1) Notice of bond sale, specifying necessary bidding requirements (if applicable).
- (2) The official bid form (if applicable).
- (3) History and description of the JHFA and the source of its authority to issue bonds.
- (4) Description of the purpose of the issue, its security, credit enhancement, synopsis of its covenants and remedies for the protection of the bondholders, tables of historic revenues and coverage, and such other matters as are customarily disclosed and set forth in an official statement presenting a comparable issue of bonds.
- (5) A reprint of the bond authorizing resolution, and such other related resolution and documents as the JHFA deems necessary and desirable.
- (6) Information necessary for compliance with full disclosure requirements.
- (7) Initiate and conduct an information program designed to stimulate interest of underwriters and investors to purchase the bonds.
- (8) Attend any sale of the bonds and advise the JHFA whether awarding the sale of bonds to the buyer is in the best interest of the JHFA.
- (9) Advise and assist the JHFA in arranging for printing, execution, and signing and delivery of the bonds and in closing after the bond sale, including scheduling and arranging for the investment of proceeds of the bond sale in compliance with arbitrage regulations.

4. SELECTION PROCESS:

Proposer will be evaluated in accordance with the Selection Criteria described herein.

4.1 EVALUATION OF RESPONSES:

- a) Buyer will determine the qualifications, interest, and availability of Proposers by reviewing all responses and, when deemed necessary in the sole discretion of the JHFA, by conducting formal interviews if needed of selected Proposers that are determined to be the best qualified based upon evaluation of the responses.
- b) The determination of which Proposers are “best qualified” will be based upon the criteria set forth in the RFP.
- c) Before making an award, the JHFA reserves the right to seek clarifications, revisions, and information it deems necessary for the proper evaluation of responses. Failure to provide any requested clarifications, revisions or information may result in rejection of the response.

- d) Buyer reserves the right to accept or reject any and all responses, or separable portions thereof, and to waive any minor irregularity, technicality, or omission if the JHFA determines that doing so will serve the JHFA's best interests. Buyer may reject any response not submitted in the manner specified by the RFP.

5. NEGOTIATION AND AWARD OF CONTRACT

- a) Generally, the JHFA will negotiate first with the highest ranked Proposer. If an agreement cannot be reached with the highest ranked Proposer, the JHFA reserves the right to negotiate and recommend an award to the next highest ranked Proposer or subsequent Proposer(s) in ranked order until an agreement is reached.
- b) The JHFA may make an award within sixty (60) days after the date the responses are due, during which period the responses shall remain firm and shall not be withdrawn. Any response that expresses a shorter duration may, in the JHFA's sole discretion, be accepted or rejected. If the award is not made within sixty (60) days, the response shall remain firm until either the Contract is awarded, or the JHFA receives from the Proposer written notice that the response is withdrawn. [Note: Withdrawal of a response may be requested within 72 hours (excluding State holidays, Saturdays, and Sundays) after the date and time responses are due. Proposer will not accept an amended response after the date and time responses are due.]
- c) Except as may otherwise be expressly set forth in the RFP, the JHFA intends to award one contract, but reserves the right to enter into a contract with multiple Proposers or to reject all responses.

6. SELECTION CRITERIA:

Respondents are requested to provide, as a minimum, the information listed under each criterion below. Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the proposal as non-responsive. The response to each of the criterion will be evaluated relative to the other responses received and will be awarded a score as shown in each of the below criteria. Respondents are encouraged to arrange their responses in a format that will offer ready review and evaluation of each criterion. Maximum points that can be received:100. Respondents are encouraged to respond to their ability and their plan to provide all the deliverables listed above.

A WRITTEN RESPONSE SHOULD BE SUBMITTED AS AN ATTACHMENT TO YOUR BID SUBMITTAL RELATED TO EACH OF THE SELECTION CRITERIA LISTED BELOW

Experience with Housing Finance Authorities (30 points maximum score)

Describe your firm's experience with Housing Finance Authorities as relates to providing financial advisory services. Provide a list of Housing Finance Authority clients over the past ten (10) years with a detailed description of the services you provide/provided. Indicate how the provision of those services will enhance your ability to provide the deliverables sought in this RFP. A written response should be submitted as an attachment to

your proposal submittal.

General Experience (10 points maximum score)

Including professional and/or technical education and training; experience in the kind of projects to be undertaken; availability of adequate personnel, equipment and facilities and the extent of repeat business of the persons. Provide names and resumes of all individuals to be assigned to this project. List previous projects similar to the one in the RFP, which have been satisfactorily completed. Provide resumes of principal staff/project manager showing years of experience in the field to which they are assigned for this project..

Approach (40 points maximum score)

Describe your firm's approach and ability to provide services sought under this RFP—specifically those listed in the Deliverables section. List previous projects similar to the one in the RFP, which have been satisfactorily completed. A written response should be submitted as an attachment to your proposal submittal.

Proximity (5 points maximum score)

Document the location of Proposer's corporate headquarters, which, if located in the Jacksonville, Florida Metropolitan Statistical Area ("MSA"), no further information is required under this criterion and maximum points will be awarded. If Proposer's corporate headquarters are not located in the Jacksonville, Florida MSA, please document the location and the nature of business of Proposer's branch office(s), if any, that are located in and/or that are closest to the Jacksonville, Florida MSA, the number of employees assigned thereto and the period of continuous existence thereof.

Additionally, Proposers are requested to demonstrate, define, and provide examples of their ability to provide the services contemplated herein in a manner comparable to having a local office in the Jacksonville, Florida MSA or to show that a local office is not necessary to satisfactorily perform the services required for this RFP. A written response should be submitted as an attachment to your proposal submittal.

Proposed Prices/Rates (15 points maximum score)

Provide a list of all fees on the following Schedule of Proposed Prices/Rates. The JHFA is seeking a fixed price engagement, including all expenses and travel of the proposer. The total proposal amount should reflect the annual cost to the JHFA for the engagement.

SCHEDULE OF PROPOSED PRICES/RATES

Proposer Name_____

FEI/SSN Number_____

Please provide the total annual fixed price for this engagement, including for each year during the term of the engagement.

The JHFA reserves the right to add or delete items, or increase the volume of services required, or not to make any purchase against this proposal if it so deems necessary at any time during the contract period.

Total Bid Amount Year 1: \$_____

Annual Percentage Increase, if any _____%