

**RFP SPECIFICATIONS**

**FOR**

**Jacksonville Housing Finance Authority**

**Professional Services: TRUSTEE**

**RFP 2025-04**

**OPEN DATE: Friday, July 18, 2025**

**TIME: 2:00 P.M.**

**PLACE: 14102 Lynn Road, Poplar Bluff, MO 63901**

**Contact Information:**

Jacksonville Housing Finance Authority Controller  
[LauraAnderson@StagnerAnderson.onmicrosoft.com](mailto:LauraAnderson@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 2025-04**

THIS FORM MUST BE SIGNED AND INCLUDED IN RESPONSE SUBMISSION					
<p><b><u>CONTRACTOR NAME AND ADDRESS:</u></b></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, July 18, 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: <b>Laura Anderson</b> Phone: <b>(904) 993-0476</b></p>				
<p><b><u>RESPONSE SECURITY REQUIREMENTS:</u></b></p> <p><b>None Required</b></p>	<p><b><u>AGREEMENT TERM/RENEWALS:</u></b></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><b><u>SAMPLE REQUIREMENTS:</u></b></p> <p><b>None Required</b></p>	<p><b><u>PERFORMANCE BOND:</u></b></p> <p><b>None Required</b></p>				
<p><b><u>QUANTITIES:</u></b></p> <p><b>None listed</b></p>	<p><b><u>FOR TECHNICAL INQUIRIES, CONTACT:</u></b></p> <p><b>All questions are to be submitted to the Controller in writing at:</b></p> <p><b><a href="mailto:LauraAnderson@StagnerAnderson.onmicrosoft.com">LauraAnderson@StagnerAnderson.onmicrosoft.com</a></b></p>				
<p><b>Department: Jacksonville Housing Finance Authority</b></p>					
<p><b>Scope:</b> Furnish all labor, materials, and equipment necessary as described by the Terms &amp; Conditions, Special Conditions, &amp; Specifications herein.</p>					
<p><b>Proposers Certification</b></p>					
	<table style="width: 100%;"> <tr> <td style="width: 70%;">Handwritten Signature of Authorized Officer of Firm</td> <td style="width: 30%;">Date</td> </tr> <tr> <td>Print Individual's Name &amp; Title</td> <td> <div style="display: flex; justify-content: space-between;"> <span>Phone Number</span> <span>Email Address</span> </div> </td> </tr> </table>	Handwritten Signature of Authorized Officer of Firm	Date	Print Individual's Name & Title	<div style="display: flex; justify-content: space-between;"> <span>Phone Number</span> <span>Email Address</span> </div>
Handwritten Signature of Authorized Officer of Firm	Date				
Print Individual's Name & Title	<div style="display: flex; justify-content: space-between;"> <span>Phone Number</span> <span>Email Address</span> </div>				

*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. Responses which exceed 20 pages of content will be deemed non-responsive and will not be scored. Required forms, title pages, table of contents and dividers do not count against the page limit. If you have questions on this requirement, please contact Laura Anderson.*

## **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**

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### **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

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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 Trustee 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:

1. The Contractor shall provide current proof of all business licenses required by local, state, and federal law as applicable.
2. The institution shall have the capability of performing all the required duties as trustee/registrar, transfer agent, paying agent, authenticating agent, document custodian and similar services to facilitate the issuance of fully registered single family and multi-family mortgage revenue bonds of the JHFA, in certificated or book entry form, and to perform similar or dissimilar necessary services with respect to other financing programs of the JHFA
3. The Contractor shall meet professional qualification requirements under the Municipal Securities Rulemaking Board (MSRB) rules, if applicable.
4. The institution shall maintain a facility for the physical receipt and delivery of securities in the borough of Manhattan in New York City, New York. Institutions which do not maintain New York facilities shall permit the name of the subcontractor to be disclosed in the official statement issued by the JHFA.
5. The institution shall adapt the recommended certificate format of the American National Standardization of the Registered Securities Certificates.
6. The institution must be willing to comply with guidelines for disclosure of information to the secondary market as recommended by the Association of Local Housing Finance Authorities or such rules promulgated by an agency of the federal government.
7. The institution should have successfully furnished similar services for other housing finance authority tax exempt and taxable bond issues.

### **3. DELIVERABLES:**

Contractor shall provide Buyer with all of the services and deliverables described in the RFP, the Response/proposal and the resulting Contract (collectively, the “Services”). If any services, functions or responsibilities are not specifically described in the RFP, the Response/proposal or the resulting Contract but are necessary for the proper performance and provision of the Services, they shall be deemed to be implied by and included within the scope of the Services to the same extent and in the same manner as if specifically described herein.

The Trustee would serve in a full-services capacity, serving the JHFA as needed on all single-family and multi-family financings as well as all other matters involving JHFA participation in financings of affordable housing in Duval County, Florida.

1. The institution shall have the capability of performing all the required duties as trustee/registrar, transfer agent, paying agent, authenticating agent, document custodian and similar services to facilitate the issuance of fully registered single family and multi-family mortgage revenue bonds of the JHFA, in certificated or book entry form, and to perform similar or dissimilar necessary services with respect to other financing programs of the JHFA.
2. The institution shall maintain a facility for the physical receipt and delivery of securities in the borough of Manhattan in New York City, New York. Institutions which do not maintain New York facilities shall permit the name of the subcontractor to be disclosed in the official statement issued by the JHFA.
3. The institution shall adapt the recommended certificate format of the American National Standardization of the Registered Securities Certificates.
4. The institution must be willing to comply with guidelines for disclosure of information to the secondary market as recommended by the Association of Local Housing Finance Authorities or such rules promulgated by an agency of the federal government.
5. The institution should have successfully furnished similar services for other housing finance authority tax exempt and taxable bond issues.
6. The institution shall employ and make available adequate qualified staff to provide all the services required.
7. The institution shall provide bond destruction reports annually which detail bond numbers for all certificates destroyed.
8. The institution shall provide services to the JHFA in accordance with the requirements of the Ordinances and/or Resolutions which authorize issuance of the bonds or other financing and appropriate the money.
9. The JHFA acknowledges that the institution may enter into subcontracts, understandings, and agreements from time to time as it deems necessary or appropriate to perform the required services; however, the JHFA reserves the right to approve any such subcontractors proposed to be utilized by the institution and impose upon them any insurance and indemnification requirements as deemed necessary. No such contract or agreement shall discharge the institution from its obligation to the JHFA. Fees for such subcontractors will be paid by the Trustee from Trustee fees.
10. If so directed by the JHFA, the institution will comply in full with the Depository Trust Company's (DTC) requirements for DTC acceptance. In addition, the institution

will comply with any future DTC acceptance requirements if requested by the JHFA, provided however the institution reserves the right to negotiate and required changes to the agreement should any future DTC compliance impose additional costs.

11. The institution shall have capability to act as a trustee for custody and investment of bond funds and such other duties as required by the Trust Indenture.
12. Indicate if your institution provides arbitrage rebate calculation services. If so, please provide a separate fee quote for these services.
13. The Institution will be required to send qualified representatives to each monthly and special meeting of JHFA and any JHFA subcommittee meetings; and as needed to attend meeting of City Council or its committees.

The JHFA has obtained the services of a Financial Advisor and will maintain the services of a Financial Advisor during the term of the Trustee's contract. The Trustee shall be required to work cooperatively with the JHFA's Financial Advisor so as to assist in the overall financing program efforts of the JHFA and, along with the JHFA's selected bond counsel and underwriter, to serve as part of a coordinated "financing team".

#### **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 underwriting 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** \_\_\_\_\_%

Indicate if your institution provides arbitrage rebate calculation services. If so, please provide a separate fee quote for these services. \$ \_\_\_\_\_