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Procurement Division

MEMORANDUM

August 13, 2018

TO: Gregory Pease, Chairman
Professional Services Evaluation Committee

FROM: Laura Stagner-Crites, Director - Finance
Jacksonville Housing Finance Authority

Subject: **Certification Letter for RFP for P-41-18 JHFA Trustee**

Please take appropriate action to issue a Request for Proposal (RFP) for the referenced professional services.

The following information is furnished in accordance with chapter 126.302 of the City Ordinance Code.

- The general purpose of the service or study:

  See attached RFP

- The Objective of the study or services:

  Provide Trustee-related services for the Authority's Mortgage Revenue Bonds and associated single- and multi-family programs.

- The estimated period of time needed for the service or study: Four (4) years initial term. Two (2) one-year extensions.

- The estimated cost of the service or study: The cost for the services will be borne by any bonds issued and will be paid from the proceeds of those bonds.

- Whether the proposed study or service would or would not duplicate a prior or existing study or service: This service would not be a duplication of service.

- List of current contracts or prior services or studies which are related to the proposed study or service. These services have most recently been procured under P-20-14 and P-25-10.

- A statement as to why the service/study cannot be done by department or agency staff: These services require specialized skills and licensing which are not available within the City's structure.

- The **names** and **telephone numbers** of **two** representatives from the using agency designated to serve on the evaluation committee as subcommittee members: William I. Gulliford, III, Chair (904) 630-6344 and Spencer Cummings, Vice-Chair (904) 354-1980.

- A project funding account number: Disbursements for this service will be made directly from the proceeds of any bonds that are issued.

- The **names** and **addresses** of **specific consultants** the using agency wishes to be included in the solicitation process.

    - BNY Mellon Trust - Tricia Heintz, 10161 Centurion Parkway, Jacksonville, FL 32256
    - US Bank Global Corp
    - Wells Fargo Corporate Trust

- The individuals responsible for developing the scope and Certification letter and the two individuals named herein to serve as subcommittee Members, have read and understand the Procurement Manual and Procurement Committee Guidelines dated March, 2017