

REQUEST FOR PROPOSALS 2013-03

AFFORDABLE HOUSING CATALYST PROGRAM SERVICES

for

FLORIDA HOUSING FINANCE CORPORATION

Issue Date: February 12, 2013
Deadline for Responses: March 19, 2013

SECTION ONE INTRODUCTION

A. The Florida Legislature established the Affordable Housing Catalyst Program (Catalyst) to provide training and technical assistance for community development activities related to affordable housing. Section 420.531, Fla. Stat., charges Florida Housing with the responsibility of providing this statewide training and technical assistance to local governments, not-for-profit corporations, public housing authorities and community-based organizations. This training and technical assistance assists with administration and implementation of the State Housing Initiatives Partnership (SHIP) Program, the Home Investment Partnerships (HOME) Program, The Hardest Hit Fund and other affordable housing programs.

B. The term of the current Affordable Housing Catalyst Program contract between Florida Housing and the current provider of these services expires June 30, 2013.

C. Florida Housing is soliciting sealed responses from qualified offerors to deliver affordable housing training and technical assistance to staff of state and local governments, not-for-profit corporations, public housing authorities and community-based organizations in accordance with the terms and conditions set forth in this RFP, and any other term and condition in any contract subsequently awarded. Florida Housing expects to select one or more Offerors that propose to provide all or some of the services specified in this RFP. Pursuant to Section 420.531, Fla. Stat., the entity to provide the necessary expertise must be recognized by the Internal Revenue Service as a nonprofit tax-exempt organization. Each Offeror selected must have as its primary mission the provision of affordable housing training and technical assistance, an ability to provide training and technical assistance statewide, and a proven track record of successfully providing training and technical assistance. Offerors shall be selected through Florida Housing's review of each Response, considering the factors identified in this RFP, and any other factors that Florida Housing considers relevant to serving the best interests of Florida Housing and its mission.

D. Offerors are sought that can demonstrate their ability to provide statewide workshops and clinics, on-site technical assistance, telephone technical assistance, and other types or modes of technical assistance deemed appropriate for the efficient and cost-effective delivery of affordable housing training and technical assistance.

SECTION TWO DEFINITIONS

For purposes of this document, the terms reflected below shall be defined as follows:

“Board”	The Board of Directors of Florida Housing Finance Corporation.
“Committee”	The review committee comprised of employees of Florida Housing established pursuant to Fla. Admin. Code R. 67-49.007.
“Contract”	The document containing the terms and conditions of this RFP and any other term and condition that the parties agree to.
“Contractor”	A person or entity providing the professional services described in Section Four of this RFP.
“Days”	Calendar days, unless otherwise specified.
“Effective Date”	The date the last party signs the Contract(s) that is (are) awarded as a result of this RFP.
“Florida Housing”	Florida Housing Finance Corporation, a public corporation and public body corporate and politic created by Section 420.504, Fla. Stat.
“Interested Party”	A person or entity that obtains a copy of the RFP from Florida Housing.
“Offeror”	Any person or entity who has the capability in all respects to perform fully the requirements contained in this RFP and submits a response to this RFP.
“Response”	The written submission by an Offeror to this RFP.
“RFP”	This Request for Proposals, including all exhibits referenced in this document and all other documents incorporated by reference.
“Staff”	Any employee of Florida Housing, including the Executive Director.

“Threshold Item”	A mandatory requirement of the RFP. Failure to meet any requirement in the RFP designated as a “Threshold Item” shall result in rejection (no further action) of a Response.
“Website”	The Florida Housing Finance Corporation website, the Universal Resource Locator (URL) of which is www.floridahousing.org

**SECTION THREE
PROCEDURES AND PROVISIONS**

A. An Offeror must submit an original and six (6) copies of the Response in a sealed envelope marked “RFP 2013-03.” An electronic copy of the proposal must be submitted on a CD at the same time as the hard copies. Each envelope or package containing Responses must clearly state the name of the Offeror. The Response that is the original must clearly indicate “Original” on that Response. Florida Housing shall not accept a faxed or e-mailed Response. Florida Housing must receive any Responses on or before 2:00 p.m., Eastern Time, on Tuesday, March 19, 2013 Responses shall be opened at that time. Responses must be addressed to:

Sherry Green
Contracts Administrator
Florida Housing Finance Corporation
227 North Bronough Street, Suite 5000
Tallahassee, FL 32301-1329
(850) 488-4197; Fax (850) 414-6548
Email: sherry.green@floridahousing.org

B. This RFP does not commit Florida Housing to award a Contract to any Offeror or to pay any costs incurred in the preparation or mailing of a Response.

C. All services under the Contract awarded are to be performed solely by the contractors, and may not be subcontracted or assigned without the prior written approval and consent of Florida Housing.

D. Florida Housing reserves the right to:

1. Waive minor deficiencies and informalities;
2. Accept or reject any or all Responses received as a result of this RFP;
3. Obtain information concerning any or all Offerors from any source;
4. Schedule an oral interview before the Committee and/or the Board from any or all Offerors;

5. Select for Contract negotiation or for award, a Response other than that with the highest score if, in the judgment of Florida Housing, its and the public's best interest shall be served; and
6. Negotiate with the successful Offerors with respect to any additional terms or conditions of the Contract.
7. Pursuant to Fla. Admin. Code R. 67-49.004, Florida Housing may modify the terms of the RFP at any point prior to the due date of Responses. A notice of such modification shall be posted on Florida Housing's Website and shall be provided to potential Offerors who requested copies of the RFP. The deadline for receipt of Responses may be extended as deemed necessary by Florida Housing.

E. Any Interested Party may submit any question regarding this RFP in writing via mail, fax, or e-mail to Sherry Green, Contracts Administrator, at the address given in Section Three, paragraph A. All questions are due by 5:00 p.m., Eastern Time, on Monday, February 26, 2013. Phone calls shall not be accepted. Florida Housing expects to respond to all questions by 5:00 p.m., Eastern Time, on Thursday, February 28, 2013. Florida Housing shall post a copy of all questions received and their answers on Florida Housing's Website at http://apps.floridahousing.org/StandAlone/FHFC_ECM/AppPage_LegalRFPs.aspx Florida Housing shall also send an electronic copy of those questions and answers in writing to any Interested Party that requests a copy. Only written responses or statements from Sherry Green, Contracts Administrator, or her designee that are posted on the Website shall bind Florida Housing. No other means of communication, whether oral or written, shall be construed as an official response or statement from Florida Housing.

F. Any person who wishes to protest the specifications of this RFP must file a protest in compliance with Section 120.57(3), Fla. Stat., and Fla. Admin. Code R. 28-110. Failure to file a protest within the time prescribed in Section 120.57(3), Fla. Stat., shall constitute a waiver of proceedings under Chapter 120, Fla. Stat.

G. The term provided in the Contract shall be for one (1) year. If the parties mutually agree in writing, the Contract may be renewed four times. Each renewal shall be for an additional one-year period. Renewals shall be contingent upon satisfactory performance evaluations by Florida Housing.

SECTION FOUR OBJECTIVES AND SCOPE OF SERVICES

All items listed in this section are subject to funding availability for the Catalyst program.

Objectives

The work being procured shall include, but is not limited to, the following two general components: a training component and a technical support and assistance component. These are described individually below.

A. Training Component

The training component of the proposal shall be designed to build the housing development capacity of state and local governments, public housing authorities, not-for-profit and community-based organizations, as a permanent resource for the benefit of communities in this state related to affordable housing. Florida Housing contemplates that the training shall be delivered in workshops, clinics and via webinars, typically lasting one to two days for six hours per day; though individual workshops or clinics could be proposed outside these parameters. The scope of the training shall include, but is not limited to:

1. Real estate development skills related to affordable housing and supportive housing including the construction process and property management and disposition;
2. The development of public-private partnerships to reduce housing costs;
4. Management and board responsibilities of community-based organizations;
5. Administration of state and federal affordable housing programs;
6. Workshops for program administrators and staff, onsite visits, guidance in achieving project completion, and a newsletter to community-based organizations and local governments; and
7. Materials for self-instruction.

B. Technical Support and Assistance Component

The Contractor shall provide specialized technical assistance and support to local governments, not-for-profits and other qualified organizations to implement the HOME Program, SHIP Program, The Hardest Hit Fund and other affordable housing programs. The Contractor's technical support and assistance proposal should reflect the capacity to respond to agency technical assistance needs as they arise during the contract year, and as identified by the Contractor, in coordination with Florida Housing. Such technical support and assistance shall include, but is not limited to:

1. The formation of local and regional housing partnerships as a means of bringing together resources to provide affordable housing.
2. The implementation of regulatory reforms to reduce the risk and cost of developing affordable housing.
3. The implementation of affordable housing goals and strategies included in local government comprehensive plans.
4. Compliance with requirements of state and federally funded housing programs and implementation of reporting systems to monitor compliance and program accomplishments.

Scope of Services

The Contractor shall perform and render the services identified below as an independent contractor and not as an agent, representative, or employee of Florida Housing. These services shall be known as "Contractor and professional services" and shall include, but are not limited to, the provision of advice and assistance to Florida Housing in the following areas:

A. Technical Assistance Delivery

The Contractor shall deliver technical assistance to housing professionals, staff of city, county and state governments, public housing authorities, not-for-profit and community-based organizations and others who participate in the development of affordable housing. Delivery of technical assistance shall be in the form of workshops, clinics, telephone and e-mail technical assistance, on-site technical assistance and webinars meeting the following criteria:

1. Workshops
 - (a) The Contractor shall conduct workshops, as contracted, specifically designed for housing professionals, local governments, housing advocates, state agencies, not-for-profits public housing authorities and community based organizations

that participate in the development of affordable housing. Instructors for workshops must be knowledgeable in the subject matter and have experience in the development of affordable housing.

- (b) Workshop topics, dates and locations shall be established by Florida Housing and the Contractor at least thirty (30) days prior to the workshop date. Workshop locations shall be selected to assure geographic distribution and access to interested parties.
- (c) Workshops shall be held on weekdays (i.e., Monday through Friday) and shall typically begin at 8:30 a.m. and end at 4:30 p.m.
- (d) The training shall consist of lecture, discussions, handouts, and other relevant information covering the workshop topic.
- (e) The Contractor shall consult with and obtain prior approval from Florida Housing in determining final workshop content, training schedule, training duration and workshop locations.
- (f) The Contractor shall be responsible for scheduling all workshop meeting rooms and speakers, and any payment associated therewith.
- (g) The Contractor shall be responsible for the registration of all workshop participants.

2. Clinics

- (a) Upon consultation between Florida Housing and the Contractor, the Contractor shall be available to conduct clinics that have been requested by one or more local governments, not-for-profits or community based organizations. Such organizations must be involved with a local or regional affordable housing delivery process in coordination with agencies providing local government funds.
- (b) Clinics shall be customized to meet the individual needs of participants from a geographically proximate region and shall be typically limited to twenty-five (25) participants. Where possible, appropriate, and relevant, the Contractor shall extend an invitation to other regional interests to participate in the clinic.
- (c) The Contractor shall be responsible for the same tasks for clinics as are set forth in Section A.1.(a)-(g) above for workshops.

3. Telephone and E-mail Technical Assistance

- (a) The Contractor shall provide telephone and e-mail technical assistance through the installation and operation of a Florida toll-free telephone line to be used solely for the purpose of providing technical assistance under the Affordable Housing Catalyst Program.
- (b) The telephone line shall be answered by a knowledgeable member of the Contractor's technical assistance team during the business day from 9:00 a.m. to 5:00 p.m., Eastern Time, Monday through Friday, excluding observed holidays or on an adjusted schedule agreed to by Florida Housing due to budget limitations.
- (c) All cost associated with the installation, staffing and maintenance of the toll-free line shall be paid for by the Contractor.
- (d) The Contractor shall establish an e-mail address(es) to receive incoming messages. E-mail inquiries must be responded to within one (1) business day or on an adjusted schedule agreed to by Florida Housing due to budget limitations.

4. On-site Technical Assistance

- (a) The Contractor shall be available to provide on-site technical assistance to local governments, not-for-profits, community-based organizations or other entities that receive SHIP, HOME or Hardest Hit Fund Program funds, or other affordable housing program funds.
- (b) Upon receipt of a request for on-site technical assistance, the Contractor shall submit a written request to Florida Housing for approval. The intake assessment shall identify who will be receiving technical assistance, the reason a technical assistance visit is needed, any problem areas, estimated length of time needed for the on-site visit, and any previously conducted site visits.
- (c) Technical assistance on-site visits shall last up to six hours, depending upon the needs and desires of the technical assistance client. In instances where six hours is inadequate to address an organization's needs, the contractor shall propose a longer time frame for assistance. In instances where more than twelve (12) hours of assistance is anticipated, the Contractor shall develop and submit a technical plan for assistance (TPA) for the organization. The TPA shall be submitted in addition to the on-site technical assistance request form described in (b) above. This plan will address the subject areas in which the organization needs assistance and will outline the actions

that will be taken to improve the organization's performance in those areas.

- (d) After each on-site technical assistance visit, the Contractor shall submit a written report to Florida Housing in an acceptable format.
- (e) All costs associated with the on-site visit must be paid for by the Contractor including: salaries, materials, preparation and research time to deliver the technical assistance to the customer and all travel related expenditures.

5. Webinars

- (a) The Contractor shall conduct webinars, as contracted, specifically designed for housing professionals, local governments, housing advocates, state agencies, not-for-profits public housing authorities and community based organizations that participate in the development of affordable housing. Instructors for webinars must be knowledgeable in the subject matter and have experience in the development of affordable housing.
- (b) Webinar topics, dates shall be established by Florida Housing and the Contractor at least thirty (30) days prior to the webinar date.
- (c) The Contractor shall consult with and obtain prior approval from Florida Housing in determining final webinar content, training schedule, and training duration.
- (d) The Contractor shall be responsible for the registration of all webinar participants.

B. Instructional Materials

- 1. The Contractor shall furnish at its own expense all instructional materials for all workshops, webinars and clinics. This shall include, but not be limited to: course outline; transparencies/charts/graphs used for classroom instruction; manuals and/or resource materials approved by Florida Housing; any transportation associated with workshop site tours for the instructors and workshop participants; audio/visual equipment, or other equipment necessary to present materials for instructional training and workshop delivery; any computers and software needed for workshop participants.

C. Workshop and Clinic Speakers

The Contractor shall provide to Florida Housing a biographical narrative of all workshop, webinar and clinic speakers reflecting their knowledge, skills and expertise in the affordable housing field. For each workshop, webinar or clinic held, speakers must be identified and be approved by Florida Housing.

D. Catalyst Marketing - Materials and Activities

1. The Contractor shall market all workshops, webinars and clinics statewide. Marketing materials shall meet the following criteria:
 - (a) The Florida Housing logo, sponsorship information, training session content, dates, times and locations shall be prominently displayed on all written marketing materials.
 - (b) Marketing materials for workshops, webinars and clinics shall be distributed at least thirty (30) days prior to any workshop or clinic, unless otherwise approved by Florida Housing. Materials shall be distributed to local governments participating in the SHIP Program and HOME Program, agencies participating in the Hardest Hit Fund Program, not-for-profit corporations which produce or desire to produce affordable housing, public housing authorities, and other interested parties. The information shall also be posted on a website maintained by the contractor which shall be linked to the Florida Housing website.
 - (c) All marketing materials must receive approval from Florida Housing prior to advertisement and distribution.
2. Two weeks prior to each workshop and clinic, the Contractor shall mail or e-mail information to each registered participant which includes: registration confirmation, workshop or clinic location, map directions, designated parking areas, lodging information and an agenda for the workshop or clinic which includes the names of the speakers and the topics to be addressed.
3. The Contractor shall also market workshop, webinar or clinic information through the newsletters of related organizations, such as Florida Community Development Association, Florida League of Cities, Florida Association of Counties, Florida Homebuilders Association, Florida American Planning Association, Regional Planning Councils, Florida Association of Housing and Redevelopment Officials, Florida Association of Homes and Services

for the Aging, and other appropriate organizations, but shall not be required to purchase paid advertising in these newsletters.

4. The Contractor shall provide to Florida Housing copies of written materials that discuss the Catalyst Program for review and comment by Florida Housing prior to printing and distribution in any brochure, newsletter or publication produced for the purpose of this contract. This material shall state that the services the Contractor performs for the Affordable Housing Catalyst Program are made possible through the Florida Housing Finance Corporation.
5. The Contractor shall maintain a web site containing the following information:
 - (a) Technical assistance listing of workshops by date and location;
 - (b) Contact information for purposes of registration;
 - (c) Course descriptions and agendas; and
 - (d) Training manuals, Powerpoint presentations, webinars and videos contracted under and paid for through Catalyst.

E. Technical Assistance Log

The Contractor shall maintain a monthly technical assistance log in a format acceptable to Florida Housing. This log shall contain statistical information on the number of on-site technical assistance visits conducted, number of telephone calls received on the toll-free telephone line, number of workshops and clinics conducted and the total number of clients served.

F. Reports

1. Monthly Report

(a) As part of each monthly report, the Contractor shall provide actual and estimated charges to date and a current record of expenditures and estimated expenditures.

2. Annual Report

A written annual report shall be provided to Florida Housing documenting all activities undertaken by the Contractor during the contract period, including workshop and clinic dates, number of workshop and clinic participants, and workshop and clinic instructors.

Such written annual report may be in electronic format acceptable to Florida Housing. All workshops or clinics shall be completed by June 30th of the applicable contract year unless otherwise approved by Florida Housing.

G. Meetings and Conferences

The Contractor shall be available upon reasonable notice to attend and conduct meetings on behalf of Florida Housing, as directed in writing by Florida Housing, to further the development of affordable housing. Meetings may be held in Tallahassee or other designated locations in Florida. Meetings conducted or attended on behalf of Florida Housing may be counted as a technical assistance on-site visit.

H. Evaluations

1. Workshops, Webinars and Clinics

For each workshop and clinic, the Contractor shall distribute an evaluation form, acceptable to Florida Housing, to all those participating in the workshop, webinar or clinic. The Contractor shall submit the completed evaluation forms to Florida Housing with the monthly report.

2. On-site Technical Assistance

For each on-site technical assistance visit, the Contractor shall distribute an on-site evaluation form, acceptable to Florida Housing, to the client receiving the on-site technical assistance. The Contractor shall instruct the client to complete the form and then mail, fax, or e-mail the evaluation to Florida Housing.

SECTION FIVE CERTIFICATION

Do not reproduce the language of Section Five in the Response. By inclusion and execution of the statement provided in this Section each Offeror certifies that:

A. The Offeror submits this Response without prior understanding, agreement, or connection with any person or entity submitting a separate Response for the same services. However, any agreement with a person or entity with whom the Response is jointly filed, and such joint filing is made clear on the face of the Response, shall be an exception so long as the Response is in all respects fair and without collusion or fraud.

B. Any material submitted in response to this RFP is a public record pursuant to Chapter 119, Fla. Stat., and subject to examination upon request, after Florida Housing

provides a notice of decision pursuant to Section 120.57(3), Fla. Stat., or within 10 Days after the Response is opened, whichever is earlier.

C. The Offeror is in compliance with Section 420.512(5), Fla. Stat., which provides:

“Service providers shall comply with the following standards of conduct as a condition of eligibility to be considered or retained to provide services. For purposes of paragraphs (a), (b), and (c) only, the term ‘service provider’ means and is limited to a law firm, an investment bank, or a credit underwriter, and the agents, officers, principals, and professional employees of the service provider.

(a) A service provider may not make contributions in any amounts, directly or indirectly, for or on behalf of candidates for Governor, nor shall any service provider make a contribution in excess of \$100 to any candidate for a member of the State Board of Administration other than the Governor in Florida while the service provider is included in an applicant pool from which service providers are selected to provide services to the corporation, while the service provider provides services to the corporation, and for the longer of a period of 2 years thereafter or for a period through the next general election for Governor.

(b) The service provider shall not participate in fundraising activities for or on behalf of candidates for Governor in Florida while the service provider is included in an applicant pool from which service providers are selected to provide services to the corporation, while the service provider provides services to the corporation, and for the longer of a period of 2 years thereafter or for a period through the next general election for Governor.

(c) Service providers shall provide to the corporation a statement that the service provider has not contributed to candidates for Governor or contributed in excess of the amounts allowed by this section for a member of the State Board of Administration or engaged in fundraising activities for or on behalf of candidates for Governor in Florida since the effective date of this section or during the 24 months preceding the service provider's application to provide services to the corporation, whichever period is shorter.

(d) The service provider may not engage in prohibited business solicitation communications with officers, members, or covered employees of the corporation.

(e) If a service provider is in doubt as to whether its activities, or the activities of its principals, agents, or employees, violate the provisions of this section, it may request a declaratory statement in accordance with the applicable rule and Section 120.565, Fla. Stat.

(f) If the corporation determines that a service provider has failed to meet the provisions of this section, it shall consider the magnitude of the violation and whether there has been a pattern of violations in determining whether to terminate or decline to enter into Contracts with the service provider.”

D. For the purpose of Section 420.512(5), Fla. Stat., “Prohibited Business Solicitation Communications” is defined by Section 420.503(31), Fla. Stat., which

provides:

“‘Prohibited business solicitation communication’ means a private written or verbal communication between a member, officer, or covered employee of the corporation and a service provider regarding the merits of the service provider and whether the corporation should retain the services of the service provider. The term does not include:

- (a) A verbal communication made on the record during a public meeting;
- (b) A written communication provided to each member and officer of the corporation and made part of the record at a public meeting;
- (c) A written proposal or statement of qualifications submitted to the corporation in response to a corporation advertisement seeking proposals or statements of qualifications as part of a competitive selection process.
- (d) A verbal or written communication related to the contractual responsibilities of a service provider who was selected to provide services or who was included in a pool of service providers eligible to provide services as a result of a competitive selection process, so long as the communication does not relate to solicitation of business.
- (e) A verbal or written communication related to a proposed method of financing or proposed projects, so long as the communication does not relate to solicitation of business.”

E. The Offeror is in compliance with Section 287.133(2)(a), Fla. Stat., which provides in pertinent part:

A person or affiliate, who has been placed on the convicted vendor list, following a conviction for a public entity crime, may not:

- a. submit a bid on a contract to provide any goods or services to a public entity;
- b. submit a bid on a contract with a public entity for the construction or repair of a public building or public work;
- c. submit bids on leases of real property to a public entity;
- d. be awarded or perform work as a contractor, supplier, subcontractor, or Contractor under a contract with any public entity; and
- e. transact business with any public entity in excess of the threshold amount provided in Section 287.017, Fla. Stat., for CATEGORY TWO: \$25,000, for a period of 36 months from the date of being placed on the convicted vendor list.

F. The Offeror acknowledges that any Offeror selected shall be prohibited from engaging in activities in connection with services related to Florida Housing transactions that produce direct or indirect financial gain for the Offeror other than the compensation

agreed upon in the Contract that results from this RFP, unless that Offeror has written consent from Florida Housing's Executive Director after Florida Housing has been fully informed of such activities in writing.

In addition to the conflict of interest rules imposed by the Florida Statutes, the Offeror(s) that is (are) selected to provide these services may not engage in any actual, apparent, or potential conflict of interest. Should any such actual apparent, or potential conflict of interest come into being subsequent to the effective date of the Contract and prior to the conclusion of the Contract, the Offeror shall provide notification (Notice of Conflict of Interest) to Florida Housing, through first class certified mail, return receipt requested, within 10 working Days, seeking written consent from Florida Housing's Executive Director. If the Offeror is found to be in non-compliance with this provision, without written consent from Florida Housing's Executive Director, any compensation received in connection with the Contract shall be subject to forfeiture to Florida Housing.

Certification Statement (Threshold)

THE FOLLOWING SHALL BE REPEATED IN THE APPLICANT'S RESPONSE AND SIGNED BY AN INDIVIDUAL AUTHORIZED TO BIND THE APPLICANT. FAILURE TO INCLUDE THE CERTIFICATION STATEMENT BEARING AN ORIGINAL SIGNATURE SHALL RESULT IN REJECTION OF THE RESPONSE.

"I agree to abide by all conditions of RFP 2013-03 and certify that all information provided in this Response is true and correct, that I am authorized to sign this Response as the Applicant and that I am in compliance with all requirements of the RFP, including but not limited to, the certification requirements stated in Section Five of this RFP."

Authorized Signature (Original)

Print Name and Title

**SECTION SIX
INFORMATION TO BE PROVIDED IN RESPONSE**

In providing the following information, the Offeror should restate each item and sub-item (with its letter and number), and limit its' Response to one bound volume. Responses to the items must be included immediately after the restated items without any reference to any appendix.

A. COVER LETTER

Each proposal shall be accompanied by a cover letter that contains a general statement of the purpose of submission and includes the following information:

1. The name, job title, address, office and cellular telephone numbers, fax number, and e-mail address of a primary contact person who shall be the primary contact with Florida Housing, and any backup contacts who would be accessible if the primary contact cannot be reached.
2. Legal business status (individual, partnership, corporation, etc.) and address and telephone number of the Offeror.

B. GENERAL INFORMATION

1. Provide evidence of certification from the Department of State that the Offeror is qualified to do business in the State of Florida.
2. Provide evidence that the entity is recognized by the Internal Revenue Service as a nonprofit tax-exempt organization.

C. EXPERIENCE, RESOURCES AND QUALIFICATIONS

1. History (20 points)

Provide evidence that the Offeror has as its primary mission the provision of affordable housing training and technical assistance, an ability to provide training and technical assistance statewide, and a proven track record of successfully providing training and technical assistance under the Affordable Housing Catalyst Program.

Provide a brief history of the Offeror, including the year organized, ownership, and the total number of employees.

2. Experience (20 points)

Please provide the following information:

Identify all salaried persons that will provide technical assistance or training under this program including: Length of time dealing with affordable housing, particular areas of expertise and percentage of time that will be dedicated to this program.

3. Training (25 points)

- a. Describe the Offeror's plan for providing training for each of the eight items listed in Section Four (A) of this RFP.
- b. Describe additional training services the Offeror proposes to provide.
- c. Describe items from Section Four (A) of this RFP that the Offeror does not propose to provide

4. Technical Assistance (25 points)

- a. Pursuant to Section Four (B), describe the Offeror's plan to provide technical support to implement affordable housing programs. Delivery of such technical assistance may be provided through on-site technical assistance, establishment of statewide technical assistance delivery capacity, maintenance of technical assistance through a web-based presence (i.e., a web-page) and statewide communications assistance. Such technical assistance shall include, but not be limited to, items 1 through 5 in Section Four (B) of this RFP.
- b. Describe additional technical assistance activities the Offeror is capable of providing.
- c. Describe items from Section Four (B) that the Offeror does not propose to provide.

5. Marketing (10 points)

Provide a description of plans for marketing the training and technical assistance proposed under this RFP. Include descriptions of newsletters, e-mail news distributions, conferences, web-site(s), printed materials, professional association organizations, or other avenues for marketing the proposed training and technical assistance

to local government housing program staff, housing agency staff, and non-profit organizations involved in affordable housing delivery.

D. COSTS/FEES

Provide a breakdown of proposed costs/fees for the following services the Offeror wishes to provide. Indicate "Not Applicable" for those services the Offeror does not wish to provide.

1. Workshop Delivery

- Newly-developed 1 day workshop \$_____
- Newly-developed 2 day workshop \$_____
- Previously-developed 1 day workshop \$_____
- Previously-developed 2 day workshop \$_____
- Webinar \$_____

The Contractor shall be responsible for scheduling all workshop meeting rooms and speakers, and any payment associated therewith.

2. Clinic Delivery

- 1 day \$_____

The Contractor shall be responsible for scheduling all clinic meeting rooms and speakers, and any payment associated therewith.

3. Monthly Telephone\ e-mail Technical Assistance \$_____

All costs associated with the administration, installation, staffing and maintenance of the toll-free line shall be paid for by the Contractor.

4. On-Site Technical Assistance Delivery per day \$_____

All costs associated with the on-site visit must be paid for by the Contractor including: salaries, materials, preparation and research time to deliver the technical assistance to the customer and all travel related expenses.

FINAL FEE SCHEDULE IS SUBJECT TO NEGOTIATION AND AVAILABILITY OF FUNDS FOR THIS PROGRAM.

E. DRUG-FREE WORKPLACE

If the Offeror has implemented a drug-free workplace program, pursuant to Section 287.087, Fla. Stat., the Offeror must submit a valid affidavit to demonstrate its status.

F. MINORITY BUSINESS ENTERPRISE

If the Offeror is a minority business enterprise as defined in Section 288.703, Fla. Stat., the Offeror must submit a valid affidavit to demonstrate its status.

G. Certification (Threshold Item):

FAILURE TO INCLUDE THE CERTIFICATION STATEMENT LOCATED IN SECTION FIVE OF THIS RFP BEARING AN ORIGINAL SIGNATURE SHALL RESULT IN REJECTION OF THE RESPONSE.

**SECTION SEVEN
EVALUATION PROCESS**

Individual Committee members shall evaluate and rank the Responses independently. As indicated in this section, points shall be assigned to certain items presented in Section Six of this RFP. The individual Committee members shall evaluate the Responses by reviewing the answers to each of the items and assigning points up to the maximum points allowed for each item. The Committee shall not use those items without points assigned in computing the numerical score, but shall use them as part of their evaluation and recommendation process, for informational purposes, or as a basis for possible disqualification. The Committee shall also use the various scored items as a part of its evaluation and recommendation process. Based on the criteria for selection, committee members shall rank each Response with the highest rank being “1”. The Committee may conduct one or more public meetings during which members may discuss their evaluations, make any adjustments deemed necessary to their evaluations to best serve the interests of Florida Housing’s mission, interview Offerors, observe presentations by Offerors, and develop a recommendation or series of recommendations to the Board. The Committee and/or Staff may make a recommendation, in addition to providing the ranking information and the information from the non-scored items to the Board for the Board to use in making the final selection. The Committee and/or Staff may also give the Board a written and/or verbal narrative describing the reasons for any recommendation. In the event of a tie, Florida Housing shall give preference to the Response certifying a drug-free workplace has been implemented in accordance with

Section 287.087, Fla. Stat. If a tie continues to exist, Florida Housing shall give preference to minority business enterprises as defined in Section 288.703, Fla. Stat. Staff may recommend that the Board conduct oral interviews as part of the evaluation process to select the Offeror. The Board may use the Responses, the Committee’s ranking, the non-scored items in the Responses, any other applicable or relevant information or recommendation provided by the Committee or Staff, any oral presentations of Offerors and any other information the Board deems relevant in its selection of Offerors to whom to award a Contract.

The Board may use the Responses, the Committee’s scoring, the non-scored items in the Responses, any other applicable or relevant information or recommendation provided by the Committee or Staff, any oral presentations of Offerors and any other information the Board deems relevant in its selection of Offerors to whom to award a Contract.

The points available for each of the items to be evaluated are as follows:

Item Reference Maximum Points

C.1 History	20
C.2 Experience	20
C.3 Training.....	25
C.4 Technical Assistance.....	25
C.5 Marketing.....	10
G. Certification Statement	Threshold Item
Total Points Available	100

**SECTION EIGHT
AWARD PROCESS**

Florida Housing shall provide notice of its decision, or intended decision, for this RFP on Florida Housing’s Website the next business day after the applicable Board vote. After posting, an unsuccessful applicant may file a notice of protest and a formal written protest in accordance with Section 120.57(3), Fla. Stat., et. al. Failure to file a protest within the time prescribed in Section 120.57(3), Fla. Stat., et. al. or failure to post the bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, Fla. Stat.