

I. MULTIFAMILY PROGRAMS - ALLOCATIONS

- A. [RFA 2025-214 Live Local SAIL Financing to be used for Developing and Reconstructing Affordable Multifamily Housing Developments](#)
- B. [RFA 2026-103 Housing Credits and SAIL Financing to Develop Housing for Homeless Persons](#)
- C. [RFA 2026-106 Financing to Develop Housing for Persons with Disabling Conditions/Developmental Disabilities](#)
- D. [RFA 2026-206 HOME and Live Local SAIL Financing to be used for Rental Developments in Rural Areas of Opportunity](#)

II. PROFESSIONAL SERVICES SELECTION (PSS)

- A. [Request for Qualifications \(RFQ\) 2026-02 for Arbitrage Rebate Analyst Services](#)
- B. [Request for Qualifications \(RFQ\) 2026-04 for Single Family Cash Flow Provider Services](#)
- C. [Request for Qualifications \(RFQ\) 2026-05 for Inclusion in a Pool of Energy Consumption Model Utility Allowance Estimate Providers](#)
- D. [Single Source Procurement for the Affordable Housing Locator Subscription Services](#)
- E. [Single Source Procurement for Comprehensive Multifamily Line of Business Software](#)

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

I. MULTIFAMILY PROGRAMS - ALLOCATIONS

A. RFA 2025-214 Live Local SAIL Financing to be used for Developing and Reconstructing Affordable Multifamily Housing Developments

1. Background:

- a) On January 6, 2026, Florida Housing Finance Corporation (Florida Housing) issued RFA 2025-214 offering \$44 million in Live Local SAIL financing for Applicants that can both reconstruct an existing affordable housing development and provide for the construction of a new development within close proximity to the existing development to be reconstructed. Each project must provide for building the new affordable housing development, relocating the tenants, and demolishing the existing development for reconstruction of an affordable housing development with more overall and affordable units.
- b) The deadline for receipt of Applications was 3:00 p.m., Eastern Time, on February 17, 2026.

2. Present Situation:

- a) Florida Housing received 11 Applications in response to this RFA. The Review Committee members, designated by the Chief Financial Officer, were Amanda DuSold, Multifamily Programs Allocations Coordinator (Chair), Len Hardy, Credit Underwriting and Cost Certification Manager, and Laura Hughes, Homebuyer and Federal Loan Programs Business Operations Administrator. Each member of the Review Committee independently evaluated and scored their assigned portions of the submitted Applications, consulting with non-committee staff and legal counsel as necessary and appropriate.
- b) At its March 4, 2026, Review Committee meeting, the individual committee members presented their scores and the Committee carried out the funding selection process in accordance with Section Five, B. of the RFA. The individual scores are set forth on the RFA webpage and can be accessed here.
- c) The RFA 2025-214 All Applications chart (provided as Exhibit A) lists the eligible Applications. The eligible Applications (i.e., Applications that met all criteria to be eligible to be considered for funding) are listed in assigned Application Number order. There were no ineligible Applications.
- d) The Review Committee considered the following motions:
 - (1) A motion for the Review Committee to approve the scoring results set out on [Exhibit A](#) and recommendations for funding set out on [Exhibit B](#).
 - (2) A motion to recommend that the Board approve the scoring results set out on Exhibit A and recommendations for funding set out on Exhibit B.
- e) The motions passed unanimously.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

3. **Recommendation:**

- a) Approve the Committee's recommendations that the Board adopt the scoring results of the 11 Applications and authorize the tentative selection of the 3 Applications (set out on Exhibit B) for funding.
- b) If no notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., staff will proceed to issue an invitation to enter credit underwriting to the Applications set out on [Exhibit B](#).
- c) If a notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., then at the completion of all litigation for those Applicants impacted by litigation, staff will present all Recommended Orders for Board approval prior to issuing invitations to enter credit underwriting to those Applicants in the resulting funding range. For those Applications in the funding range but not impacted by litigation, staff will issue invitations to underwriting as outlined in rule 67-48.0072(1), F.A.C.
- d) There is no Live Local SAIL remaining.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

B. RFA 2026-103 Housing Credit and SAIL Financing to Develop Housing for Homeless Persons

1. Background

- a) On November 4, 2025, Florida Housing Finance Corporation (Florida Housing) issued RFA 2026-103 offering \$6,100,000 in Housing Credits, \$12,500,000 in SAIL financing and \$3,157,295 in HOME-ARP funding for proposed Developments with a demographic of Homeless that also include a portion of units for Persons with Special Needs in Medium and Large counties.
- b) The deadline for receipt of Applications was 3:00 p.m., Eastern Time, on January 20, 2026.

2. Present Situation

- a) Florida Housing received 7 Applications in response to this RFA. The Review Committee members, designated by the Chief Financial Officer, were Zach Summerlin, Policy Director (Chair), Kelisha Austin, Policy Coordinator, Bryan Barber, Multifamily Programs Allocations Manager, Morgan Guse, Credit Underwriting and Cost Certification Manager, Robert Raeside, Multifamily Programs Manager, Elaine Roberts, Policy Administrator, and Nicole Singleton, Policy and Special Programs Manager. Each member of the Review Committee independently evaluated and scored their assigned portions of the submitted Applications, consulting with non-committee staff and legal counsel as necessary and appropriate.
- b) At its March 3, 2026, Review Committee meeting, the individual committee members presented their scores and the Committee carried out the funding selection process in accordance with Section Five, B. of the RFA. The individual scores are set forth on the RFA webpage and can be accessed here.
- c) The RFA 2026-103 All Applications chart (provided as Exhibit C) lists the eligible and ineligible Applications. The eligible Applications (i.e., Applications that met all criteria to be eligible to be considered for funding) and the ineligible Applications are listed in assigned Application Number order.
- d) The Review Committee considered the following motions:
 - (1) A motion for the Review Committee to approve the scoring results set out on [Exhibit C](#) and recommendations for funding set out on [Exhibit D](#).
 - (2) A motion to recommend that the Board approve the scoring results set out on Exhibit C and recommendations for funding set out on Exhibit D.
- e) The motions passed unanimously.

3. Recommendation

- a) Approve the Committee's recommendations that the Board adopt the scoring results of the 7 Applications and authorize the tentative selection of the 2 Applications (set out on Exhibit D) for funding.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

- b) If no notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., staff will proceed to issue an invitation to enter credit underwriting to the Applications set out on [Exhibit D](#).
- c) If a notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., then at the completion of all litigation for those Applicants impacted by litigation, staff will present all Recommended Orders for Board approval prior to issuing invitations to enter credit underwriting to those Applicants in the resulting funding range. For those Applications in the funding range but not impacted by litigation, staff will issue invitations to underwriting as outlined in rule 67-48.0072(1), F.A.C.
- d) There is no HC or SAIL funding remaining.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

C. RFA 2026-106 Financing to Develop Housing for Persons with Disabling Conditions/Developmental Disabilities

1. **Background**

- a) On November 4, 2025, Florida Housing Finance Corporation (Florida Housing) issued RFA 2026-106 offering \$4,128,000 in Housing Credits and \$6,000,000 in SAIL financing for the development of Permanent Supportive Housing for either (i) persons with a Disabling condition that also includes a portion of units for Homeless Households, or (ii) Persons with Developmental Disabilities.
- b) The deadline for receipt of Applications was 3:00 p.m., Eastern Time, on January 21, 2026.

2. **Present Situation**

- a) Florida Housing received 4 Applications in response to this RFA. The Review Committee members, designated by the Chief Financial Officer, were Zach Summerlin, Policy Director (Chair), Kelisha Austin, Policy Coordinator, Bryan Barber, Multifamily Programs Allocations Manager, Len Hardy, Credit Underwriting and Cost Certification Manager, Robert Raeside, Multifamily Programs Manager, Elaine Roberts, Policy Administrator, and Nicole Singleton, Policy and Special Programs Manager. Each member of the Review Committee independently evaluated and scored their assigned portions of the submitted Applications, consulting with non-committee staff and legal counsel as necessary and appropriate.
- b) At its March 5, 2026, Review Committee meeting, the individual committee members presented their scores and the Committee carried out the funding selection process in accordance with Section Five, B. of the RFA. The individual scores are set forth on the RFA webpage and can be accessed here.
- c) The RFA 2026-106 All Applications chart (provided as Exhibit E) lists the eligible and ineligible Applications. The eligible Applications (i.e., Applications that met all criteria to be eligible to be considered for funding) and the ineligible Applications are listed in assigned Application Number order.
- d) The Review Committee considered the following motions:
 - (1) A motion for the Review Committee to approve the scoring results set out on [Exhibit E](#) and recommendations for funding set out on [Exhibit F](#).
 - (2) A motion to recommend that the Board approve the scoring results set out on Exhibit E and recommendations for funding set out on Exhibit F.
- e) The motions passed unanimously.

3. **Recommendation**

- a) Approve the Committee's recommendations that the Board adopt the scoring results of the 4 Applications and authorize the tentative selection of the 1 Application (set out on Exhibit F) for funding.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

- b) If no notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., staff will proceed to issue an invitation to enter credit underwriting to the Applications set out on [Exhibit F](#).
- c) If a notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., then at the completion of all litigation for those Applicants impacted by litigation, staff will present all Recommended Orders for Board approval prior to issuing invitations to enter credit underwriting to those Applicants in the resulting funding range. For those Applications in the funding range but not impacted by litigation, staff will issue invitations to underwriting as outlined in rule 67-48.0072(1), F.A.C.
- d) There is \$1,928,000 in HC and \$3,790,300 in SAIL remaining. As provided in Section Five, B. of the RFA, any remaining funding will be distributed as approved by the Board.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

D. RFA 2026-206 HOME and Live Local SAIL Financing to be used for Rental Developments in Rural Areas of Opportunity

1. Background

- a) On January 8, 2026, Florida Housing Finance Corporation (Florida Housing) issued RFA 2026-206 offering \$35 million in HOME funding and \$7 million in Live Local SAIL funding for the construction of affordable housing in a Rural Areas of Opportunity as defined by Florida Commerce.
- b) The deadline for receipt of Applications was 3:00 p.m., Eastern Time, on January 29, 2026.

2. Present Situation

- a) Florida Housing received 8 Applications in response to this RFA. The Review Committee members, designated by the Chief Financial Officer, were Reeves Campbell, Multifamily Programs Business Operations Administrator (Chair), Amanda DuSold, Multifamily Programs Allocations Coordinator, and David Woodward, Federal Loan Programs Administrator. Each member of the Review Committee independently evaluated and scored their assigned portions of the submitted Applications, consulting with non-committee staff and legal counsel as necessary and appropriate.
- b) At its February 26, 2026, Review Committee meeting, the individual committee members presented their scores and the Committee carried out the funding selection process in accordance with Section Five, B. of the RFA. The individual scores are set forth on the RFA webpage and can be accessed here.
- c) The RFA 2026-206 All Applications chart (provided as Exhibit G) lists the eligible Applications. The eligible Applications (i.e., Applications that met all criteria to be eligible to be considered for funding) are listed in assigned Application Number order. There were no ineligible Applications.
- d) The Review Committee considered the following motions:
 - (1) A motion for the Review Committee to approve the scoring results set out on [Exhibit G](#) and recommendations for funding set out on [Exhibit H](#).
 - (2) A motion to recommend that the Board approve the scoring results set out on Exhibit G and recommendations for funding set out on Exhibit H.
- e) The motions passed unanimously.

3. Recommendation

- a) Approve the Committee's recommendations that the Board, adopt the scoring results of the 8 Applications and authorize the tentative selection of the 5 Applications (set out on Exhibit H) for funding.
- b) If no notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., staff will proceed to issue an invitation to enter credit underwriting to the Applications set out on Exhibit H.

MULTIFAMILY PROGRAMS - ALLOCATIONS

Action

- c) If a notice of protest or formal written protest is filed in accordance with Section 120.57(3), Fla. Stat., et. al., then at the completion of all litigation for those Applicants impacted by litigation, staff will present all Recommended Orders for Board approval prior to issuing invitations to enter credit underwriting to those Applicants in the resulting funding range. For those Applications in the funding range but not impacted by litigation, staff will issue invitations to underwriting as outlined in rule 67-48.0072(1), F.A.C.
- d) There is \$716,000 in HOME funding remaining. As provided in Section Five, B. of the RFA, any remaining funding will be distributed as approved by the Board.

PROFESSIONAL SERVICES SELECTION (PSS)

Action

II. PROFESSIONAL SERVICES SELECTION (PSS)

A. Request for Qualifications (RFQ) 2026-02 for Arbitrage Rebate Analyst Services

1. Background:

- a) On January 5, 2026, Florida Housing staff issued a competitive solicitation for qualified firms to provide Arbitrage Rebate Analyst Services. A review committee was established to make a recommendation to the Board.

2. Present Situation:

- a) The deadline for receipt of responses was 2:00 p.m., February 11, 2026. A copy of the RFQ is provided as [Exhibit A](#).
- b) Three proposals were received from:
 - BLX Group LLC
 - Hawkins Delafield & Wood LLP
 - Integrity Public Finance Consulting LLC
- c) Members of the review committee were Melanie Weathers, Finance Director (Chairperson); Tamara Alford, Mortgage Pipeline Manager; and Michelle Connelly, Financial Manager.
- d) Each member of the review committee independently reviewed and scored the proposals prior to convening for the Review Committee meeting, which was held at 10:00 a.m., February 26, 2026.
- e) At the February 26th meeting, the review committee provided final scores for each of the proposals in accordance with the evaluation criteria set forth in Section Seven of the RFQ. The score sheet is provided as [Exhibit B](#).

3. Recommendation:

- a) The review committee recommends that Florida Housing enter into contract negotiations with all three respondents: BLX Group LLC; Hawkins Delafield & Wood LLP; and Integrity Public Finance Consulting LLC.

PROFESSIONAL SERVICES SELECTION (PSS)

Action

B. Request for Qualifications (RFQ) 2026-04, for Single Family Cash Flow Provider Services

1. Background:

- a) On January 5, 2026, Florida Housing staff issued a competitive solicitation for qualified firms to provide Single Family Cash Flow Provider Services. A review committee was established to make a recommendation to the Board.

2. Present Situation:

- a) The deadline for receipt of responses was 2:00 p.m., February 10, 2026. A copy of the RFQ is provided as [Exhibit C](#).
- b) Three proposals were received from:
- Caine Mitter & Associates Incorporated
 - cfX Incorporated
 - RBC Capital Markets, LLC
- c) Members of the review committee were Melanie Weathers, Finance Director (Chairperson); Michelle Connelly, Financial Manager; and Kenny Derrickson, Assistant Comptroller.
- d) Each member of the review committee individually reviewed and scored the proposals prior to convening for the Review Committee meeting, which was held at 10:00 a.m., February 27, 2026.
- e) At the February 27th meeting, the review committee provided final scores for each of the proposals, in accordance with the evaluation criteria set forth in Section Seven of the RFQ. The score sheet is provided as [Exhibit D](#).

3. Recommendation:

- a) The review committee recommends that Florida Housing enter into contract negotiations with the two highest scoring respondents, RBC Capital Markets, LLC and Caine Mitter & Associates Incorporated, to serve as the lead and back-up Single Family Cash Flow Providers” as contemplated in the RFQ.

PROFESSIONAL SERVICES SELECTION (PSS)

Action

C. Request for Qualifications (RFQ) 2026-05 for Inclusion in a Pool of Energy Consumption Model Utility Allowance Estimate Providers

1. **Background:**

- a) On January 26, 2026, Florida Housing staff issued a competitive solicitation for qualified firms to be included in a pool of Energy Consumption Model Utility Allowance Estimate Providers. A review committee was established to make a recommendation to the Board.

2. **Present Situation:**

- a) The deadline for receipt of responses was 2:00 p.m., February 18, 2026. A copy of the RFQ is provided as [Exhibit E](#).
- b) Four proposals were received from:
 - Alan Plummer Associates, Inc.
 - Core Consultants of America, LLC
 - Energy Consulting, Inc.
 - Stowers Consulting, Inc. dba Green Summit Engineering and dba Green Summit

All four proposals were determined to be responsive.

- c) Members of the review committee were Matt Jugenheimer, Development Finance Administrator (Chairperson); Joketra Hall, Senior Compliance Analyst; and George Shawhan, Senior Compliance Analyst.
- d) Each member of the review committee independently reviewed the proposals prior to convening for the Review Committee meeting, which was held at 10:00 a.m., March 5, 2026.
- e) At the March 5th meeting, the review committee provided final scores for the responsive proposals in accordance with the evaluation criteria set forth in Section Seven of the RFQ. The score sheet is provided as [Exhibit F](#).

3. **Recommendation:**

- a) The review committee recommends that Florida Housing enter into contract negotiations with all four respondents: Alan Plummer Associates, Inc.; Core Consultants of America, LLC; Energy Consulting, Inc.; Stowers Consulting, Inc. d/b/a Green Summit Engineering and d/b/a Green Summit for inclusion in the pool of Energy Consumption Model Utility Allowance Estimate Providers.

PROFESSIONAL SERVICES SELECTION (PSS)

Action

D. Single Source Procurement for the Affordable Housing Locator Subscription Services

1. Background:

- a) Florida Housing's affordable housing locator (FloridaHousingSearch.com) has been a public affordable rental housing search resource since 2006. In 2005, Florida Housing's Board of Directors authorized staff to carry out a solicitation process to select an entity to develop and maintain a web-based housing Locator to help Floridians conduct searches for available rental housing financed by Florida Housing. Florida Housing soon opened the locator to non-Florida Housing financed rental units to any affordable rental unit statewide that met Florida Housing's inclusion standards (for example, units that serve households at or below 140% of area median income). Florida Housing also required the locator services to include a call center to assist individuals to conduct housing searches that could not access or use the web-based search engine. The call center's staff also assist landlords initially register rental units, as well as update unit availability.
- b) In annual meetings since 2016, the Board has authorized a single source procurement to purchase housing Locator services directly from Emphasys Computer Solutions, Inc., for a period of one year.
- c) In the last eight years, Florida Housing has also utilized the Locator's on-line and call center services to assist households displaced by hurricanes find short and long-term rental housing.

2. Present Situation:

- a) On June 2, 2026, the term for Florida Housing's current contract with Emphasys Computer Solutions, Inc., will expire.
- b) The Locator service has been very successful. It is well-respected for being a very user-friendly service that allows people to locate available housing that best fits their individual and family needs. Florida Housing relies on the Locator as a statewide housing search resource used by consumers, service providers, and public officials. Throughout the past decade, Florida Housing has never received a complaint about the Locator or attendant call center services.
- c) The services are widely used by supportive services agencies, homeless services providers, and legislators' staff in their efforts to assist Floridians find affordable and available rental housing that meets their needs. The on-line and call center services are ADA certified for use by persons with disabilities. Individuals can access the information online, in many languages, 24 hours a day. In 2020, the Locator services platform was updated to better accommodate searches conducted on mobile devices, making this more user friendly as individuals can now better access this tool using cell phones. They can easily search for available rental housing using a wide variety of search criteria with special mapping features and receive apartment listings that provide a variety of important information about each unit. In addition, the site connects people to other housing and community resources through website links and provides helpful tools for renters such as an affordability calculator, rental checklist, and renter rights and responsibilities information.

PROFESSIONAL SERVICES SELECTION (PSS)

Action

- d) The toll-free call center is staffed by specialists who are trained to work with both the public and landlords, with multilingual capacity to assist Spanish, Haitian-Creole and Portuguese-speaking persons. The call center vendor is a non-profit organization that strives to train and hire persons with disabilities, formerly homeless individuals, and those with other special needs. Many of the call center specialists have had experiences similar to those of the consumers they now assist in finding housing. Florida Housing has not found any other rental housing locator businesses that provide the call center services. These call center services have been instrumental when households need additional assistance searching for a home. The call center's capacity to quickly identify available rental housing for displaced households has also been extremely useful after a disaster.
- e) There are almost 230,000 units, representing nearly 9,000 landlords now registered in the Locator's database. Staff has not identified another vendor providing comparable services, which include:
- Assisting landlords to manage listings by helping to register units, monitoring for accuracy and helping them keep the listings current. It is not an "inventory style" listings like other services; it is real-time availability, rather than static "inventory style" listings that are typically offered through other housing locators and is critical to State disaster response needs as well as for locating available properties in a time-sensitive/time-critical manner. Listings are required to be updated every 14 to 28 days.
 - Screening properties for listing accuracy and Fair Housing violations and removing those in non-compliance.
 - Backing up its online services with a multilingual toll-free call center comprised of housing-specific trained customer service specialists who help tenants locate housing, help landlords initially register and regularly update listings, and support families displaced as a result of natural disasters and economic situations.
 - Conducting rental housing searches for households that do not have access to the internet or need additional assistance.
 - Professionally trained case managers, in addition to call center customer specialists, who assist households with special needs and/or those in crisis by helping them search for temporary and permanent housing that addresses their immediate and long-term needs.
 - Contacting and working with households directly upon request by staff from Florida Housing, State agencies and Legislators' offices; and
 - Assisting state and local emergency management systems in helping displaced households find housing local, regional and statewide within 1 week of a disaster. A component of disaster services is to update available housing stock in its database on a 24/7 basis and conduct ongoing searches for additional housing units and options.
- f) Florida Housing staff continues to be very satisfied with the provision of services by Emphasys to consumers who may need help with the site, advocates for consumers, landlords and Florida Housing itself. Consistent with Rule 67-49.0032, F.A.C., staff reviewed the marketplace to determine whether other vendors currently provide housing locator services with comparable statewide capacity, functionality, and service integration. With the end of the current contract approaching, the staff researched whether other prospective vendors may be qualified and interested in applying to manage the Locator services with the

PROFESSIONAL SERVICES SELECTION (PSS)

Action

same capacity and quality as the current Locator service. Staff's review focused on whether other vendors could provide an integrated housing locator platform that includes: (i) a statewide database of affordable rental housing listings; (ii) real-time availability updates; (iii) landlord participation and listing management; (iv) a multilingual toll-free call center staffed by trained housing specialists; and (v) the ability to support disaster response housing searches.

- g) Florida Housing has not identified another vendor that currently provides the same combination of integrated housing locator services and operational infrastructure and capacity required to support Florida Housing's statewide housing search platform.
- h) As a result of our research, and after consideration of the standards Florida Housing expects for a Housing Locator service and the available vendor options, Florida Housing's staff believes that Emphasys continues to be the only vendor with the capacity, qualifications and experience to maintain the level of service that Florida Housing and the State of Florida rely on and have come to expect for Locator services.
- i) In accordance with Ch. 67-49.0032, F.A.C., the initial single source procurement listing for these services was posted to Florida Housing's website on March 2, 2026.

3. **Recommendation:**

- a) Staff believes that it is in the best interest of Florida Housing to continue with these services and proceed with a new one-year contract. Staff requests authorization to enter into negotiations for a single source contract with Emphasys Computer Solutions, Inc., for this purpose.

PROFESSIONAL SERVICES SELECTION (PSS)

Action

E. Single Source Procurement for Comprehensive Multifamily Line of Business Software

1. Background:

- a) In 2017, Florida Housing issued a competitive solicitation for qualified firms to design and implement a comprehensive multifamily line of business software system. The result of that solicitation was the procurement of ProLink Solutions, Inc.'s "ProLinkHFA" base system alongside several optional modules, including the Tax Credit Allocation, Loan Origination & Multifamily Lending, Asset Management, Program Compliance, and Special Assets modules.
- b) Since 2018, Florida Housing has relied on the ProLinkHFA system as a central component of its multifamily data environment. ProLinkHFA is used across multiple program areas for property-level data intake, underwriting, servicing, asset management, compliance activities, and portfolio reporting. The system interacts with internal applications, reporting tools, and nightly backup processes that depend on ProLinkHFA's existing data structures and configurations.
- c) Florida Housing's workflows, data schemas, and operational processes have been developed over several years within the ProLinkHFA environment. These configurations and system interactions are specific to the ProLinkHFA platform and cannot be supported or maintained by another vendor without substantial system redevelopment or migration.

2. Present Situation:

- a) Florida Housing's current contract with ProLink Solutions, Inc., is set to expire on August 23, 2026.
- b) Only ProLink Solutions can provide continued hosting, maintenance, and support of Florida Housing's existing implementation without disrupting established operations, data environments, or system integrations. Continued use of the existing implementation ensures consistency in data processing, staff workflows, and reporting practices that rely on the current configuration. Transitioning to another platform or provider at this time would require a significant system migration effort, including redevelopment of integrations, data conversion, and retraining of staff across multiple program areas.

3. Recommendation:

- a) Staff recommends that the Board authorize staff to enter into a new, one-year single source contract with ProLink Solutions, Inc., for their Comprehensive Multifamily Line of Business Software solution.

RFA 2025-214 - All Applications

Application Number	Name of Development	County	County Size	Developer(s)	Authorized Principal Representative	Combination or Linked Application?	Total Units in this App	Combination or both Linked Applications Total Live Local SAIL Request	Combination and Linked Applications' Eligibility Status	Combination and Linked Applications' Commitment to Ten 22% Units Commitment	Combination and Linked Applications' Total Points	Combination and Linked Applications' A/B Leveraging	Combination and Linked Applications' Age of Development Funding	Combination and Linked Applications' Number of Units Funding Preference	Combination and Linked Applications' Job Creation Status	Combination and Linked Applications' Lottery Number
2026-346BSN	LD Apt	Orange	L	LD Apt Developer, LLC	Daniel Coakley	Reconst.	160	22,000,000	Y	Y	40	A	Y	Y	Y	1
2026-347BS	CGPA Parcel B	Orange	L	CGPA Parcel B Developer, LLC	Daniel Coakley	New	160	22,000,000	Y	Y	40	A	Y	Y	Y	1
2026-356BSN	Springfield Apartments 1	Leon	M	New Affordable Housing Partners, LLC; Tallahassee Housing Developer, Inc	Carmen Chubb	Combo	240	19,000,000	Y	Y	40	A	Y	Y	Y	2
2026-355S	Dominium Cocoa West	Brevard	M	Cocoa Leased Housing Development III, LLC; Space Coast Community Development Corporation	Katessa Archer	Combo	360	22,000,000	Y	N	40	A	Y	Y	Y	5
2026-352BS*	Avalon Pointe	Leon	M	Royal American Properties, LLC; RACB Developer, LLC	Joseph Chapman	New	92	20,413,621	Y	Y	40	A	Y	N	Y	6
2026-353BSN	Briarwood Apartments	Leon	M	Royal American Properties, LLC; RACB Developer, LLC	Joseph Chapman	Reconst.	93	20,413,621	Y	Y	40	A	Y	N	Y	6
2026-348S	Gallery at Little Havana	Miami-Dade	L	Gallery at Little Havana Developer, LLC	Alberto Milo, Jr.	Reconst.	130	20,000,000	Y	N	40	A	N	Y	Y	3
2026-349S	Residences at Lummus Parc	Miami-Dade	L	Residences at Lummus Parc Developer, LLC	Alberto Milo, Jr.	New	152	20,000,000	Y	N	40	A	N	Y	Y	3
2026-350BS	Culmer Residences	Miami-Dade	L	Culmer Residences Development, LLC	Kenneth Naylor	Combo	192	20,500,000	Y	N	40	A	N	Y	Y	8
2026-351BS	Urban Square at Mercy Drive	Orange	L	Dantes Partners South LLC; Thayer Street I LLC	Omabuwa Binitie	Combo	172	19,780,000	Y	N	40	B	Y	Y	Y	4
2026-354BS	Bayside Gardens	Okaloosa	M	25 Robinwood Developers, LLC; Bayside Development of Fort Walton, LLC	Carol Gardner	Combo	144	16,000,000	Y	N	40	B	Y	Y	Y	7

*The Corporation Funding Per Set-Aside Amount changed during scoring.

RFA 2025-214 – Review Committee Recommendations

Total Live Local SAIL Funding	44,000,000
Total Live Local SAIL Allocated	44,000,000
Total Live Local SAIL Remaining	-

All Applicants that choose to commit to the Ten 22% Units Commitment will be offered up to \$3,375,000 in forgivable NHTF funding for the 22% Units as further described in Exhibit H of the RFA.

Application Number	Name of Development	County	County Size	Developer(s)	Authorized Principal Representative	Combination or Linked Application?	Total Units in this App	Each Application's Total Live Local SAIL Request Amount (SAIL plus ELI)	Combination and Linked Applications' Commitment to Ten 22% Units Commitment	Linked Applications' Total Points	Linked Applications' A/B Leveraging	Linked Applications' Age of Development Funding Preference	Linked Applications' Number of Units Funding Preference	Linked Applications' Job Creation Status	Linked Applications' Lottery Number
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First Application - fund one Combination Application or one set of Linked Applications that commits to the Ten 22% Units Commitment

2026-346BSN	LD Apt	Orange	L	LD Apt Developer, LLC	Daniel Coakley	Reconst.	160	\$11,000,000	Y	40	A	Y	Y	Y	1
2026-347BS	CGPA Parcel B	Orange	L	CGPA Parcel B Developer, LLC	Daniel Coakley	New	160	\$11,000,000	Y	40	A	Y	Y	Y	1

Second Application - fund one Combination Application or one set of Linked Applications that does not commit to the Ten 22% Units Commitment

2026-355S	Dominium Cocoa West	Brevard	M	Cocoa Leased Housing Development III, LLC; Space Coast Community Development Corporation	Katessa Archer	Combo	360	\$22,000,000	N	40	A	Y	Y	Y	5
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RFA 2026-103 All Applications

Application Number	Name of Development	County	County Size	Region	Demographic	Total Units	Name of Principal Representative	Developer	HC Request Amount	SAIL Request Amount	ELI Loan Request Amount	Total SAIL Request (SAIL plus ELI)	Eligible For Funding?	Priority Level	Operating PSH Experience Points Preference	Involvement in the Local Homeless Resources Network Points Preference	Accessibility Preference	Rental Assistance History Preference	Supportive Services Funding History Preference	Qualifying Financial Assistance Preference	Corporation Funding Per Set-Aside	A/B Leveraging	Florida Job Creation Preference	Lottery Number
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Eligible Applications																								
2026-326CSA	Woodland Pointe	Volusia	M	Central Florida	H - <80	80	Leeanne Sacino	HTG Woodland Pointe Developer, LLC; HfH Woodland Pointe Developer, LLC	\$2,800,000	\$5,968,400	\$281,600	6,250,000	Y	1	Y	Y	Y	Y	Y	Y	\$360,941.85	A	Y	6
2026-327CSA	The Adderley 2	Hillsborough	L	Tampa Bay	H - <80	100	Sarah Combs	Blue TA2 Developer, LLC; Metro TA2 Developer, LLC	\$3,300,000	\$5,782,500	\$467,500	6,250,000	Y	1	Y	N	Y	Y	Y	Y	\$305,202.98	A	Y	2
2026-330CSA	Home @ Haven	Hillsborough	L	Tampa Bay	H - <80	86	Janet M Stringfellow	Gorman & Company, LLC; VOAF Ortus Developer, LLC	\$3,300,000	\$5,750,300	\$499,700	6,250,000	Y	1	Y	Y	Y	N	N	N	\$354,549.43	A	Y	4

Ineligible Applications																								
2026-328CSA	CDS Roosevelt Apartments	Hillsborough	L	Tampa Bay	H - <80	90	Andrew Sewnauth	CDS Monarch, Inc; Newstar Development, LLC	\$3,300,000	\$5,750,300	\$499,700	6,250,000	N	1	N	N	Y	Y	Y	Y	\$338,791.67	A	Y	1
2026-329CSA	Hibiscus Pointe	Orange	L	Central Florida	H - <80	75	Michael Ruane	CORE Hibiscus Pointe Developer LLC;	\$2,800,000	\$5,870,000	\$377,600	6,247,600	N	1	N	N	Y	Y	Y	Y	\$356,870.76	A	Y	7
2026-331CSA	ViaNova	Leon	M	North Florida	H - <80	72	Janet M Stringfellow	Gorman & Company, LLC; VOAF Ortus Developer, LLC	\$2,800,000	\$5,962,800	\$287,200	6,250,000	N	1	Y	Y	Y	N	N	N	\$372,903.08	A	Y	5
2026-332CSA	New Life Seniors	Orange	L	Central Florida	H - <80	85	Dennis K. Hutchins	John Stanley Florida Inc.; New Life Ministries of Orlando, Inc.	\$3,062,937	\$2,044,000	\$472,000	2,516,000	N	1	N	N	Y	N	Y	Y	\$320,430.54	A	Y	3

RFA 2026-103 Review Committee Recommendations

Total HC Available for RFA	6,100,000
Total HC Allocated	6,100,000
Total HC Remaining	-

Medium HC Available for RFA	2,800,000	Large HC Available for RFA	3,300,000
Medium HC Allocated	2,800,000	Large HC Allocated	3,300,000
Medium HC Remaining	-	Large HC Remaining	-

Total SAIL Available for RFA	12,500,000
Total SAIL Allocated	12,500,000
Total SAIL Remaining	-

\$3,157,295 in forgivable HOME-ARP funding has been made available in this RFA. Each Application will be awarded a portion of the total available. The HOME-ARP funding amount may increase or decrease in credit underwriting, based on overall awards.

[illegible]

RFA 2026-106 All Applications

Application Number	Name of Development	County	Name of Authorized Principal	Name of Developers	Demo	Total Units	HC Request Amount	Total SAIL Request Amount (SAIL + ELI)	Eligible For Funding?	Priority Level	Operating PSH Experience Points Preference	Involvement in the Local Homeless Resources Network Pref, if DC, OR Service Prov/Coord Pref, if DD	Accessibility Preference	Rental Assistance History Preference	Supportive Services Funding History Preference	Qualifying Financial Assistance Preference	Corporation Funding Per Set-Aside	A/B Leveraging	Florida Job Creation Preference	Lottery Number
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Eligible Applications

2026-333CS	Bramblewood Isle	Brevard	Leeanne Sacino	HTG Bramblewood Isle Developer, LLC; HfH Bramblewood Isle Developer, LLC	DC - <80	74	\$2,800,000	5,150,000	Y	1	Y	Y	Y	Y	Y	Y	\$391,216.22	A	Y	3
2026-335CS	Independence Landing II	Leon	Denise Wilson	Southport Community Development, Inc.; Independence Developer, LLC	DD - >80	42	\$2,200,000	2,209,700	Y	1	Y	N	Y	N	N	Y	\$481,275.00	A	Y	1

Ineligible Applications

2026-334CS	CDS Roosevelt II Apartments	Hillsborough	Andrew Sewnauth	CDS Monarch, Inc; Newstar Development, LLC	DD - <80	60	\$3,034,000	6,000,000	N	1	N	N	Y	Y	Y	Y	\$473,488.23	A	Y	2
2026-336CS	New Life Seniors	Orange	Dennis K. Hutchins	John Stanley Florida Inc.; New Life Ministries of Orlando, Inc.	DC - <80	85	\$3,187,299	2,516,000	N	1	N	N	N	N	Y	Y	\$332,493.65	A	Y	4

Total HC Available for RFA	4,128,000
Total HC Allocated	2,200,000
Total HC Remaining	1,928,000
Total SAIL Available for RFA	6,000,000
Total SAIL Allocated	2,209,700
Total SAIL Remaining	3,790,300

Application Number	Name of Development	County	Name of Authorized Principal	Name of Developers	Demo	Total Units	HC Request Amount	Total SAIL Request Amount (SAIL + ELI)	Eligible For Funding?	Priority Level	Operating PSH Experience Points Preference	Involvement in the Local Homeless Resources Network Pref, if DC, OR Service Prov/Coord Pref, if DD	Accessibility Preference	Rental Assistance History Preference	Supportive Services Funding History Preference	Qualifying Financial Assistance Preference	Corporation Funding Per Set-Aside	A/B Leveraging	Florida Job Creation Preference	Lottery Number
2026-335CS	Independence Landing II	Leon	Denise Wilson	Southport Community Development, Inc.; Independence Developer, LLC	DD - >80	42	\$2,200,000	2,209,700	Y	1	Y	N	Y	N	N	Y	\$481,275.00	A	Y	1

RFA 2026-206 – All Applications

Application Number	Name of Development	County	County Size	RAO	Name of Applicant	Name of Developers	Total Units	Demo.	Eligible HOME Request Amount	Eligible for Funding?	Points	Qualified for CHDO Goal?	HOME Funding Experience Preference	Previous Affordable Housing Experience Funding Preference	Eligible HOME Request as % of Maximum	Match as % of HOME request amount	Florida Job Creation Preference	Lottery
2026-337SH	Serenity at Holly Park	Lafayette	S	North Central RAO	Holly Park Holdings LLC	Stone Soup Development, Inc.; Sailed Homes, LLC	43	E, Non-ALF	\$6,600,000	Y	10	N	Y	Y	94.29%	0.00%	Y	2
2026-338SH	Serenity at Arcadia	DeSoto	S	South Central RAO	VolkHaus Holdings LLC	Stone Soup Development, Inc.; Sailed Homes, LLC	43	E, Non-ALF	\$6,900,000	Y	10	N	Y	Y	98.57%	0.00%	Y	5
2026-339SH	Solara at Lake City	Columbia	S	North Central RAO	HHA Community 01, LLC	Hope Housing Alliance, Inc.; W.E. Yerby Advisory Services, LLC	24	F	\$6,980,000	Y	10	N	Y	Y	99.71%	0.00%	Y	4
2026-340SH	Tranquility at Chipley	Washington	S	Northwest RAO	HELP Housing Chipley, LLC	Timshel Hill Tide Developers, LLC; HELP Housing Developer, LLC	24	F	\$6,995,000	Y	10	N	Y	Y	99.93%	0.00%	Y	3
2026-341SH	Sandcastle Way	Gulf	S	Northwest RAO	Sandcastles Foundation, Inc., a "Florida Not for Profit" Corporation	Sandcastle Foundation, Inc., a "Florida Not for Profit" Corporation	25	F	\$6,890,000	Y	5	N	Y	Y	99.91%	0.00%	Y	7
2026-342SH	Tranquility at DeFuniak Springs	Walton	S	Northwest RAO	HELP Housing DeFuniak Springs, LLC	Timshel Hill Tide Developers, LLC; HELP Housing Developer, LLC	24	F	\$6,899,000	Y	10	N	Y	Y	98.56%	0.00%	Y	6
2026-343SH	Solara at Defuniak, North	Walton	S	Northwest RAO	HHA Community 02, LLC	Hope Housing Alliance, Inc.; W.E. Yerby Advisory Services, LLC	24	F	\$6,980,000	Y	10	N	Y	Y	99.71%	0.00%	Y	1

RFA 2026-206 – Review Committee Recommendations

Total HOME Available for RFA	35,000,000
Total HOME Allocated	34,284,000
Total HOME Remaining	716,000

\$7 million of Live Local SAIL has been made available in this RFA. Each Application will be awarded a portion of the total available. The Live Local SAIL funding amount may increase or decrease in credit underwriting, based on overall awards.

Application Number	Name of Development	County	County Size	RAO	Name of Applicant	Name of Developers	Total Units	Demo.	Eligible HOME Request Amount	Eligible for Funding?	Points	Qualified for CHDO Goal?	HOME Funding Experience Preference	Previous Affordable Housing Experience Funding Preference	Eligible HOME Request as % of Maximum	Match as % of HOME request amount	Florida Job Creation Preference	Lottery
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CHDO Goal
none

Remaining Funding

2026-337SH	Serenity at Holly Park	Lafayette	S	North Central RAO	Holly Park Holdings LLC	Stone Soup Development, Inc.; Sailed Homes, LLC	43	E, Non-ALF	\$6,600,000	Y	10	N	Y	Y	94.29%	0.00%	Y	2
2026-342SH	Tranquility at DeFuniak Springs	Walton	S	Northwest RAO	HELP Housing DeFuniak Springs, LLC	Timshel Hill Tide Developers, LLC; HELP Housing Developer, LLC	24	F	\$6,899,000	Y	10	N	Y	Y	98.56%	0.00%	Y	6
2026-338SH	Serenity at Arcadia	DeSoto	S	South Central RAO	VolkHaus Holdings LLC	Stone Soup Development, Inc.; Sailed Homes, LLC	43	E, Non-ALF	\$6,900,000	Y	10	N	Y	Y	98.57%	0.00%	Y	5
2026-340SH	Tranquility at Chipley	Washington	S	Northwest RAO	HELP Housing Chipley, LLC	Timshel Hill Tide Developers, LLC; HELP Housing Developer, LLC	24	F	\$6,995,000	Y	10	N	Y	Y	99.93%	0.00%	Y	3
2026-341SH	Sandcastle Way	Gulf	S	Northwest RAO	Sandcastles Foundation, Inc., a "Florida Not for Profit" Corporation	Sandcastle Foundation, Inc., a "Florida Not for Profit" Corporation	25	F	\$6,890,000	Y	5	N	Y	Y	99.91%	0.00%	Y	7

REQUEST FOR QUALIFICATIONS (RFQ) 2026-02

ARBITRAGE REBATE ANALYST SERVICES

for

FLORIDA HOUSING FINANCE CORPORATION

January 5, 2026

SECTION ONE

INTRODUCTION

Florida Housing Finance Corporation (“Florida Housing”) is soliciting competitive, sealed responses from qualified firms to provide arbitrage rebate analyst services in accordance with the terms and conditions set forth in this Request for Qualifications (“RFQ”), and any other term and condition in any contract subsequently awarded. Respondents will be selected and determined through Florida Housing’s review of each response, considering the factors identified in this RFQ. Florida Housing expects to select one or more Respondents that propose to provide all of the services specified in this RFQ.

SECTION TWO

DEFINITIONS

For purposes of this document, the following terms will be defined as follows:

“Arbitrage”	Arbitrage occurs when Florida Housing invests its bond proceeds at a yield higher than the overall borrowing yield on its bond issue. As it relates to tax-exempt bonds, Arbitrage is the ability to invest proceeds received from the sale of tax-exempt debt in higher-yielding taxable securities.
“Arbitrageur”	The entity providing the arbitrage rebate services described in Section Four of this RFQ.
“Arbitrage Rebate”	Arbitrage Rebate is the payment of Arbitrage earned on the investment bond proceeds to the Internal Revenue Service in accordance with the requirements of Section 148 of the Internal Revenue Code and as defined by U.S. Treasury Department regulations.
“Board”	The Board of Directors of Florida Housing Finance Corporation.
“Committee”	The review committee composed only of employees of Florida Housing that is established pursuant to Rule 67-49.007, Fla. Admin. Code.
“Contractor”	A person or entity providing the professional services described in Section Four of this RFQ.
“Days”	Calendar days, unless otherwise specified.
“Effective Date”	The date the last party signs the contract that is awarded as a result of this RFQ.

“Florida Housing”	Florida Housing Finance Corporation, a public corporation and public body corporate and politic created by s. 420.504, F.S.
“Non-arbitrage Certificate”	The key tax document for a bond issue which describes the rebate requirements associated with the debt service fund. The Non-arbitrage Certificate is part of the bond transcript.
“Respondent”	Any person or entity who has the capability in all respects to perform fully the requirements contained in this RFQ, and submits a response to this RFQ.
“Response”	The written submission by a Respondent to this RFQ.
“RFQ”	This RFQ, including all exhibits referenced in this document and all other documents incorporated by reference.
“Staff”	Any employee of Florida Housing.
“Trustee”	An organization which provides trustee services for Florida Housing.
“Trust Indenture”	The document by the terms of which an entity issues or guarantees or provides for the issue or guarantee of debt obligations secured by a security interest and in which an entity is appointed as trustee for the holders of the debt obligation issued, guaranteed or provided for under it.
“Website”	The Florida Housing Finance Corporation website, the URL of which is www.floridahousing.org .

SECTION THREE

PROCEDURES AND PROVISIONS

A. Respondents will submit their Response to:

<https://www.floridahousing.org/legal/procurements/RFQ-2026-02-Document-Upload>

Florida Housing must receive the entire Response on or before 2:00 p.m., Eastern Time, on February 11, 2026, as Responses will be opened at that time. Any Responses received after the deadline will be considered non-responsive. One complete copy of the response in PDF format is preferred; the PDF must be text-searchable and not password-protected, unless specified otherwise in Section Six below, and the file name ought to contain a reference to both the solicitation number (RFQ 2026-02) and the name of the Respondent. Please note that the site will ask for the Respondent's contact information and the solicitation number prior to being able to upload the Response. Florida Housing will not accept a mailed or faxed Response.

B. This RFQ does not commit Florida Housing to award a contract to any Respondent or to pay any costs incurred in the preparation or submission of a Response.

C. All services under the contract awarded are to be performed solely by the Contractor, unless subcontracted or assigned with 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 RFQ;
3. Obtain information concerning any or all Respondents from any source;
4. Request an oral interview before the Board from any or all Respondents;
5. Select for contract negotiation or for award a Response other than (or in addition to) that with the highest score in order to serve the best interests of Florida Housing and the public; and
6. Negotiate with the successful Respondent with respect to any additional terms or conditions of the contract.

E. Any interested party may submit any question regarding this RFQ in writing via e-mail to the Contract Administrator at Contract.Admin@floridahousing.org. All questions must be submitted no later than 2:00 p.m., Eastern Time, on January 21, 2026. Phone calls will not be accepted. Florida Housing expects to respond to all questions in writing by 5:00 p.m., Eastern Time, on January 28, 2026. Florida Housing will post a copy of all questions received and the corresponding answers on Florida Housing's website at:

<http://www.floridahousing.org/legal/procurements/request-for-qualifications>.

Only written responses or statements from the Contract Administrator that are posted on our website will bind Florida Housing. No other means of communication, whether oral or written, may be construed as an official response or statement from Florida Housing.

F. Between the release of the solicitation and the end of the 72-hour period following the posting of the notice of intended award, excluding Saturdays, Sundays, and state holidays, respondents to this solicitation or persons acting on their behalf may not contact any member of Florida Housing's Board of Directors or any Florida Housing employee concerning any aspect of this solicitation, except in writing to the Contract Administrator. Violation of this provision may be grounds for rejecting a response.

G. Any person who wishes to protest the specifications of this RFQ must file a protest in compliance with s. 120.57(3), F.S., and Rule Ch. 28-110, Fla. Admin. Code. Failure to file a protest

within the time prescribed in s. 120.57(3), F.S., will constitute a waiver of proceedings under Ch. 120, F.S.

H. The term of the contract will be for three years, subject to satisfactory performance at the sole discretion of Florida Housing. If the parties mutually agree in writing, the contract may be renewed once for an additional three years.

I. Florida Housing is not required to use the services of any selected Contractor or to assign any work to such provider, and may terminate the contract with any selected Contractor without cause and without penalty.

J. Pursuant to Rule 67-49.004, Fla. Admin. Code, Florida Housing may modify the terms of the RFQ at any point prior to the due date for Responses. A notice of such modification will be posted on Florida Housing's Website. Any Respondent will have at least seven days from the date of the posting of the notice of the modification to submit or modify its Response.

K. The terms of this RFQ, and any modifications thereto, will be incorporated into any contract offered as a result of this RFQ. Failure of a successful Respondent to accept these obligations in the final contract may result in cancellation of the award and selection of an alternate Respondent.

L. By submitting a Response to this RFQ, the Respondent agrees that any resulting contracts or agreements (and any attachments, exhibits, and amendments) may be executed and delivered by electronic signatures. As used herein, the term "electronic signatures" shall have the meaning in s. 668.50, F.S.

SECTION FOUR

SCOPE OF SERVICES

Florida Housing issues tax-exempt revenue bonds to finance the acquisition and construction of single family and multifamily housing in the state of Florida. In order to ensure the continuation of the tax-exempt status of the bonds, it is necessary that Arbitrage Rebate calculations be performed in accordance with the Internal Revenue Code of 1986, as amended, and as defined by U.S. Treasury Department regulations.

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

A. On an annual basis, and no later than 60 days after the end of the computation period, the Arbitrageur shall provide to Staff a written calculation of arbitrage earnings and the rebate requirement for each bond issue subject to Section 148(f) of the Internal Revenue Code of 1986, as amended, together with a written opinion confirming that the calculations were performed in accordance with Section 148(f) and all applicable regulations. The Trustee shall supply the information necessary to perform these calculations, and the Arbitrageur shall

compare the Trustee's data with the Guaranteed Investment Contract (GIC) provider statement or any other investment statement authorized by the Trust Indenture.

B. Apprise Staff in writing of any changes in Arbitrage compliance regulations that may occur during the term of the Contract.

C. Perform all duties required of the Arbitrageur as specified by the Trust Indenture, the Non-arbitrage Certificate, and any other documents governing the applicable bond series (Bond Documents).

D. Prepare the appropriate tax form, currently 8038-T (or equivalent) for the designated Florida Housing signatory, in the event that a rebate payment to the Internal Revenue Service is required. The completed tax form along with the rebate analysis report must be received by Florida Housing's Senior Financial Administrator no later than 45 days after the end of the five-year computation period.

E. Consult with Staff to address post-issuance tax compliance concerns.

F. Verify to Staff that the bond issue is subject to the rebate regulations and determine what general and/or elective exceptions are available.

G. Perform the following on the debt yields and excess earnings as defined by U.S. Treasury Department regulations including, but not limited to:

1. Data review and analysis;
2. Compute/verify the allowable yield limit for the issues;
3. Compute/verify the amount of excess earnings, if any, rebatable to the U.S. Treasury;
4. Compute/verify the amount of spend-down penalties payable to the U.S. Treasury under issues applying such provisions;
5. Prepare all necessary Internal Revenue Service forms relating to services provided;
6. Submit final reports to Staff showing the calculation method used, assumptions, conclusions, and any recommendations for changes in record keeping for the services provided; and
7. Provide a legal opinion of the liability due to the U.S. Treasury under any of the Arbitrage regulations. The opinion shall include a statement that the calculation methodology used is consistent with current tax laws and regulations and may be relied upon by Florida Housing in determining liability payments to the U.S. Treasury.

H. Assist Staff, as necessary, in the event of an Internal Revenue Service inquiry and/or audit, both during and subsequent to the contract period.

I. Identify and separate accounts for all gross proceeds including those requiring allocation analyses due to circumstances involving transferred proceeds and/or commingled funds.

J. Retain all support documentation for the rebate calculations (hard copy records and computer database) for six years after the retirement or final maturity of the bonds or until any on-going litigation, audit, etc., is resolved, if longer.

K. Perform such other arbitrage rebate services and provide advice as requested by Staff.

SECTION FIVE

CERTIFICATION

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

A. The Respondent 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 will 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 RFQ is a public record pursuant to Ch. 119, F.S., and subject to examination upon request, but only after Florida Housing provides a notice of decision pursuant to s. 120.57(3), F.S., or within 30 days after the Response is opened, whichever is earlier.

C. The Respondent, if awarded a contract under this RFQ, will comply with s. 420.512(5), F.S. For the purpose of s. 420.512(5), F.S., “Prohibited Business Solicitation Communications” is defined by s. 420.503(34), F.S.

D. The Respondent further affirms it is in compliance with s. 420.512(5)(c), F.S.

E. The Respondent is in compliance with s. 287.133(2)(a), F.S.

F. The Respondent is in compliance with s. 448.095, F.S.

G. The Respondent understands and agrees to cooperate with any audits conducted in accordance with the provisions set forth in s. 20.055(5), F.S.

H. The Respondent attests, under penalty of perjury, that it does not meet any of the criteria in s. 287.138(2)(a) – (c), F.S.

I. The Respondent attests, under penalty of perjury, that it does not use coercion for labor or services as defined s. 787.06, F.S.

J. Pursuant to s. 119.0701(2)(b), F.S., the Respondent, if awarded a contract under this RFQ, will be required to comply with public records laws, specifically to:

1. Keep and maintain public records required by Florida Housing to perform the service.
2. Upon request from Florida Housing's custodian of public records, provide Florida Housing with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to Florida Housing.
4. Upon completion of the contract, transfer, at no cost, to Florida Housing all public records in possession of the contractor or keep and maintain public records required by Florida Housing to perform the service. If the contractor transfers all public records to Florida Housing upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Florida Housing, upon request from Florida Housing's custodian of public records, in a format that is compatible with Florida Housing's information technology systems.

If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor's duty to provide public records relating to this contract, contact the Corporation Clerk at:

Corporation Clerk
227 N. Bronough Street, Suite 5000
Tallahassee, Florida 32301-1329
Phone: 850.488.4197

E-mail: Corporation.Clerk@floridahousing.org

Notwithstanding anything contained herein to the contrary, the provisions and requirements of this paragraph will only apply if and when the Contractor is acting on behalf of Florida Housing.

K. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging in activities in connection with services related to Florida Housing transactions that produce direct or indirect financial gain for the Respondent other than for the compensation agreed

upon in the contract that results from this RFQ, unless that Respondent has Florida Housing's written consent after Florida Housing has been fully informed of such activities in writing.

L. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging 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 Respondent will provide written notification (Notice of Conflict of Interest) to Florida Housing's Contract Administrator within 10 working days for review by Florida Housing's Executive Director in consultation with the Ethics Officer. If the Respondent is found to be in non-compliance with this provision, any compensation received in connection with this contract will be subject to forfeiture to Florida Housing.

M. The Respondent, in submitting this Response, acknowledges and agrees that the terms and conditions of this RFQ, as well as any modifications thereto, will be incorporated into any contract offered as a result of this RFQ.

N. CERTIFICATION STATEMENT:

FAILURE TO INCLUDE THE CERTIFICATION STATEMENT LOCATED IN SECTION SIX OF THIS RFQ BEARING AN ORIGINAL SIGNATURE WILL RESULT IN REJECTION OF THE RESPONSE.

SECTION SIX

INFORMATION TO BE PROVIDED IN RESPONSE

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

A. COVER LETTER

Each proposal must 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, and e-mail address of a primary contact person, who will be responsible for day-to-day contact with Florida Housing, and any backup personnel 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 Respondent.

B. GENERAL INFORMATION

1. Provide documentation to show that the Respondent is authorized to do business in the State of Florida.
2. Provide a copy of the declaration page as evidence of current professional liability/errors and omissions insurance to include the following:
 - Name and carrier and policy number;
 - Effective date of insurance;
 - Policy exclusions, if any;
 - Current coverage amounts;
 - Staff covered; and
 - Type of coverage.
3. Provide a brief history of the Respondent's firm relative to Arbitrage Rebate calculations and experience. Include the year organized, ownership, affiliated companies and relationships, and the total number of employees.
4. Describe the Respondent's presence in Florida, and ability to be accessible to Florida Housing staff, availability for meetings, conferences, consultation, etc.
5. Describe the Respondent's ability to provide the services requested in Section Four of this RFQ immediately upon award of the contract.
6. Provide a statement of any other qualifications or services, which the Respondent considers to be significant, innovative or otherwise relevant to Florida Housing.

C. EXPERIENCE AND RESOURCES

1. Describe the Respondent's experience providing the services or engaging in activities as they relate to the work being requested in Section Four of this RFQ.
2. Describe the legal expertise available within and/or to the Respondent with regard to the Arbitrage provisions of Section 148 of the Internal Revenue Code. Describe the quality control review process and quality assurance your firm provides to ensure that work performed is consistent with current federal tax and other applicable laws. Provide examples of tax opinions.
3. Provide Florida Housing with documentation regarding any failure to provide the required rebate calculation to the IRS within the specified timeframe.
4. Provide a list of state and local housing finance agencies (HFAs) for which the Respondent has provided services similar to those requested in Section Four of this RFQ within the last five years. Include the length of time the Respondent has worked with each HFA, and

whether the Respondent is currently providing or has ceased to provide services during this time.

D. QUALIFICATIONS OF PERSONNEL

Provide an organizational chart and an overview of the key individuals (team members) proposed to be assigned to Florida Housing's account. The overview shall include the following information for each individual:

1. Name, title, and role on this engagement;
2. Office street address, e-mail address, and office and cellular telephone numbers;
3. Identify those members that have experience in or with (a) cash flow preparation, (b) single family and/or multifamily finance, and (c) other state and local housing authorities;
4. Specific qualifications and expertise; and
5. A description of the individuals' relevant educational and professional accomplishments.

E. LEGAL ISSUES

1. Describe any completed or pending litigation involving or alleged to involve securities laws violation(s) by members of the Respondent's firm and specifically those that would be involved with providing services to Florida Housing.
2. Disclose any representation or relationship that may present a conflict of interest.
3. Provide a description of to what extent, if any, the Respondent, including all holding companies and subsidiaries, or any officers or directors or other key personnel, is now, or has been, under indictment, or subject to an order from a court of competent jurisdiction. Describe impending litigation involving any entity connected with providing services in response to this RFQ. Additionally, provide a description of to what extent, if any, the Respondent, including all holding companies and subsidiaries, or any officers or directors or other key personnel, is now, or has been, during the last ten years, under investigation, been the subject of any allegation, or under an order issued by a regulatory or governmental agency. If any such condition exists, or existed, discuss the outcome, if one has occurred, or probably outcome, and to what extent this could impair the level of service of the Respondent.

F. TECHNICAL APPROACH

1. Provide a brief description of the Respondent's approach in providing the services in Section Four of this RFQ.

2. Describe the format that the Respondent will require for data submission from Florida Housing to perform calculations. Describe in detail the information and assistance you will require from Florida Housing in completing the Arbitrage calculations. Indicate whether additional information or reports will be required.

3. Provide an actual report or sample of calculations that the Respondent has performed for services similar to those requested in Section Four of the RFQ.

G. FEES

Provide the proposed fees to be charged in connection with the services described in Section Four of this RFQ as outlined in Table 1 below. Fees proposed must include all charges relating to the services required under the contract and all out-of-pocket expenses, such as telephone, postage and shipping, printing and/or copy costs, and travel, if any. No costs will be reimbursed under the contract.

TABLE 1 FEES		
Annual Rebate Calculation	Per Multifamily Bond Issue	Per Single Family Bond Issue
Year 1 – Initial Report Fee, including engagement fee	\$	\$
Subsequent Annual Report Fee	\$	\$
Extra Period Fee (Additional fee for preparing Arbitrage Rebate report covering period in excess of 12 months.)	\$	\$

FINAL FEE SCHEDULE WILL BE SUBJECT TO NEGOTIATION.

H. DRUG-FREE WORKPLACE

If the Respondent has implemented a drug-free workplace program, the Respondent must submit the following certification indicating that it meets all of the requirements of s. 287.087, F.S.:

I hereby certify on behalf of the Respondent, under the terms of RFQ 2026-02, that the Respondent has implemented a drug-free workplace program pursuant to s. 287.087, F.S.

Authorized Signature: _____

Print Name: _____

Print Title: _____

I. MINORITY BUSINESS ENTERPRISE

If the Respondent is a minority business enterprise as defined in s. 288.703, F.S., the Respondent must submit the following certification:

I hereby certify on behalf of the Respondent, under the terms of RFQ 2026-02, that the Respondent is a “minority business enterprise” as defined in s. 288.703(3), F.S.

Authorized Signature: _____

Print Name: _____

Print Title: _____

J. CERTIFICATION (Mandatory Item)

THE FOLLOWING WILL BE REPEATED IN THE RESPONDENT’S RESPONSE AND SIGNED BY AN INDIVIDUAL AUTHORIZED TO BIND THE RESPONDENT. THIS IS A MANDATORY ITEM. FAILURE TO INCLUDE THE CERTIFICATION STATEMENT BEARING AN ORIGINAL SIGNATURE, EXACTLY AS STATED AND WITHOUT ANY ADDITIONS, DELETIONS OR CAVEAT LANGUAGE, WILL RESULT IN REJECTION OF THE RESPONSE.

“I agree to abide by all conditions of RFQ 2026-02 and certify that all information provided in this Response is true and correct, that I am authorized to sign this Response as the Respondent and that I am in compliance with all requirements of the RFQ, including but not limited to, the certification requirements stated in Section Five of this RFQ.”

Authorized Signature (Original)

Print Name and Title

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SECTION SEVEN EVALUATION PROCESS

The individual Committee members will independently evaluate the Responses by reviewing the answers to each of the items identified in Section Six of this RFQ and assigning points up to the maximum points allowed for each item. The points available for items in Section Six are to be evaluated are as follows:

<u>Item Reference</u>	<u>Maximum Points</u>
B. General Information.....	10
C. Experience and Resources	30
D. Qualifications of Personnel.....	30
F. Technical Approach	20
G. Fees	10
Total Points Available.....	100

In the event of a tie, Florida Housing will give preference in the award process to the Response certifying a drug-free workplace has been implemented in accordance with s. 287.087, F.S. If a tie continues to exist, Florida Housing will give preference to minority business enterprises as defined in s. 288.703, F.S.

The Committee will conduct one or more public meetings during which members will discuss their evaluations and develop a recommendation or series of recommendations to the Board. The Committee's recommendation will be based on the cumulative scoring and information gathered from the non-scored items. The Board may use the Responses, the Committee's scoring, the non-scored items in the Responses, any other information or recommendation provided by the Committee or staff, and any other information the Board deems relevant in its selection of Respondents to whom to award a contract. ¹

SECTION EIGHT AWARD PROCESS

Florida Housing will provide notice of its decision, or intended decision, for this RFQ 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 s. 120.57(3), F.S. Failure to file a protest within the time prescribed in s. 120.57(3), F.S. or failure to post the bond or other security required by law within the time allowed for filing a bond will constitute a waiver of proceedings under Ch. 120, F.S.

¹ Pursuant to s. 287.05701 F.S., Florida Housing may not request documentation of or consider a vendor's social, political, or ideological interest when determining if the vendor is a responsible vendor. Additionally, Florida Housing may not give preference to a vendor based on the vendor's social, political, or ideological interests.

RFQ 2026-02 - Arbitrage Rebate Analyst Services

		BLX Group LLC ★				Hawkins Delafield & Wood LLP ★				Integrity Public Finance Consulting LLC ★			
SECTION SIX ITEM REFERENCE	Max Score	Melanie	Tamara	Michelle	Total	Melanie	Tamara	Michelle	Total	Melanie	Tamara	Michelle	Total
B. General Information	10	10	10	9	29	9	10	9	28	7	8	7	22
C. Experience and Resources	30	28	29	28	85	29	28	27	84	25	24	22	71
D. Qualifications of Personnel	30	29	30	28	87	29	28	27	84	27	24	25	76
F. Technical Approach	20	17	18	19	54	15	16	19	50	16	16	14	46
G. Fees	10	9	9	6	24	10	10	7	27	8	8	5	21
TOTAL POINTS	100	93	96	90	279	92	92	89	273	83	80	73	236
A. Cover Letter	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y	
E. Legal Issues	Y/N	N	Y	N		N	Y	N		N	Y	N	
H. Drug-Free Workplace	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y	
I. Minority Business Enterprise	Y/N	Y	N	N		N	N	N		N	N	N	
J. Certification	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y	

REQUEST FOR QUALIFICATIONS (RFQ) 2026-04

SINGLE FAMILY CASH FLOW PROVIDERS

for

FLORIDA HOUSING FINANCE CORPORATION

January 5, 2026

SECTION ONE

INTRODUCTION

Florida Housing Finance Corporation (“Florida Housing”) is soliciting competitive, sealed responses from qualified firms to provide single family cash flow provider services in accordance with the terms and conditions set forth in this Request for Qualifications (“RFQ”), and any other term and condition in any contract subsequently awarded. Respondents will be selected and determined through Florida Housing’s review of each response, considering the factors identified in this RFQ. Florida Housing expects to select one or more Respondents that propose to provide all of the services specified in this RFQ.

SECTION TWO

DEFINITIONS

For purposes of this document, the following terms will be defined as follows:

“Board”	The Board of Directors of Florida Housing Finance Corporation.
“Committee”	The review committee composed only of employees of Florida Housing that is established pursuant to Rule 67-49.007, Fla. Admin. Code.
“Contractor”	A person or entity providing the professional services described in Section Four of this RFQ.
“Days”	Calendar days, unless otherwise specified.
“Effective Date”	The date the last party signs the contract that is awarded as a result of this RFQ.
“Florida Housing”	Florida Housing Finance Corporation, a public corporation and public body corporate and politic created by s. 420.504, F.S.
“Respondent”	Any person or entity who has the capability in all respects to perform fully the requirements contained in this RFQ, and submits a response to this RFQ.
“Response”	The written submission by a Respondent to this RFQ.
“RFQ”	This RFQ, including all exhibits referenced in this document and all other documents incorporated by reference.
“Website”	The Florida Housing Finance Corporation website, the URL of which is www.floridahousing.org .

SECTION THREE
PROCEDURES AND PROVISIONS

A. Respondents will submit their Response to:

<https://www.floridahousing.org/legal/procurements/RFQ-2026-04-Document-Upload>

Florida Housing must receive the entire Response on or before 2:00 p.m., Eastern Time, on February 10, 2026, as Responses will be opened at that time. Any Responses received after the deadline will be considered non-responsive. One complete copy of the response in PDF format is preferred; the PDF must be text-searchable and not password-protected, unless specified otherwise in Section Six below, and the file name ought to contain a reference to both the solicitation number (RFQ 2026-04) and the name of the Respondent. Please note that the site will ask for the Respondent's contact information and the solicitation number prior to being able to upload the Response. Florida Housing will not accept a mailed or faxed Response.

B. This RFQ does not commit Florida Housing to award a contract to any Respondent or to pay any costs incurred in the preparation or submission of a Response.

C. All services under the contract awarded are to be performed solely by the Contractor, unless subcontracted or assigned with 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 RFQ;
3. Obtain information concerning any or all Respondents from any source;
4. Request an oral interview before the Board from any or all Respondents;
5. Select for contract negotiation or for award a Response other than (or in addition to) that with the highest score in order to serve the best interests of Florida Housing and the public; and
6. Negotiate with the successful Respondent with respect to any additional terms or conditions of the contract.

E. Any interested party may submit any question regarding this RFQ in writing via e-mail to the Contract Administrator at Contract.Admin@floridahousing.org. All questions must be submitted no later than 2:00 p.m., Eastern Time, on January 20, 2026. Phone calls will not be accepted. Florida Housing expects to respond to all questions in writing by 5:00 p.m., Eastern Time, on January 27, 2026. Florida Housing will post a copy of all questions received and the corresponding answers on Florida Housing's website at:

<http://www.floridahousing.org/legal/procurements/request-for-qualifications>.

Only written responses or statements from the Contract Administrator that are posted on our website will bind Florida Housing. No other means of communication, whether oral or written, may be construed as an official response or statement from Florida Housing.

F. Between the release of the solicitation and the end of the 72-hour period following the posting of the notice of intended award, excluding Saturdays, Sundays, and state holidays, respondents to this solicitation or persons acting on their behalf may not contact any member of Florida Housing's Board of Directors or any Florida Housing employee concerning any aspect of this solicitation, except in writing to the Contract Administrator. Violation of this provision may be grounds for rejecting a response.

G. Any person who wishes to protest the specifications of this RFQ must file a protest in compliance with s. 120.57(3), F.S., and Rule Ch. 28-110, Fla. Admin. Code. Failure to file a protest within the time prescribed in s. 120.57(3), F.S., will constitute a waiver of proceedings under Ch. 120, F.S.

H. The term of the contract will be for three years, subject to satisfactory performance at the sole discretion of Florida Housing. If the parties mutually agree in writing, the contract may be renewed once for an additional three years.

I. Florida Housing is not required to use the services of any selected Contractor or to assign any work to such provider, and may terminate the contract with any selected Contractor without cause and without penalty.

J. Pursuant to Rule 67-49.004, Fla. Admin. Code, Florida Housing may modify the terms of the RFQ at any point prior to the due date for Responses. A notice of such modification will be posted on Florida Housing's Website. Any Respondent will have at least seven days from the date of the posting of the notice of the modification to submit or modify its Response.

K. The terms of this RFQ, and any modifications thereto, will be incorporated into any contract offered as a result of this RFQ. Failure of a successful Respondent to accept these obligations in the final contract may result in cancellation of the award and selection of an alternate Respondent.

L. By submitting a Response to this RFQ, the Respondent agrees that any resulting contracts or agreements (and any attachments, exhibits, and amendments) may be executed and delivered by electronic signatures. As used herein, the term "electronic signatures" shall have the meaning in s. 668.50, F.S.

SECTION FOUR

SCOPE OF SERVICES

Florida Housing anticipates selecting one lead and one back up cash flow provider. The awarded Contractor(s) will be required to perform the following services:

A. Run annual, or more frequently if requested, consolidated cash flows for the 1995 Master Indenture, the 2009 NIBP Indenture and any future and stand-alone indentures if requested. The provider must be able to run cash flows after origination of a bond issue to verify mortgage yield and verify bond yield if requested.

B. Track 10-year, 32 year and 42-month rule genealogy of repayments in Florida Housing's Line of Credit at the Federal Home Loan bank. Genealogy reports will be sent electronically monthly or more frequently if requested by Florida Housing.

C. Perform and review standalone cash flows at the request of Florida Housing as well as integrate standalone cash flows performed by other vendors into the consolidated cash flows for rating agency review and rating.

D. Provide assistance to the senior book-running manager by providing all necessary details needed for stand-alone cash flows for the purposes of supporting the financial strength of the Master Indenture

E. Assist with responses to rating agency, NCSHA questions and consultations.

F. Model Florida Housing profitability under various program performance parameters at the request of Florida Housing. Projections should include range of prepayment, production and stress assumptions.

G. Provide monthly and historical prepayment speed analyses for all indentures.

H. Assist Florida Housing and trustee with bond redemption optimization to include prepayment, excess revenue and reserve analysis, and recycling prepayments for funding zero participations.

I. Present benefits and risks, and guide Florida Housing in potential cross calling to include universal cap transfers and all other implications.

J. Draft trustee instructions at the request of Florida Housing.

K. Collaborate with Florida Housing staff to optimize Loan/MBS settlement into bond issues.

L. Verify cash flows if requested by 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 Section Six of this RFQ, each Respondent certifies that:

A. The Respondent 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 will 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 RFQ is a public record pursuant to Ch. 119, F.S., and subject to examination upon request, but only after Florida Housing provides a notice of decision pursuant to s. 120.57(3), F.S., or within 30 days after the Response is opened, whichever is earlier.

C. The Respondent, if awarded a contract under this RFQ, will comply with s. 420.512(5), F.S. For the purpose of s. 420.512(5), F.S., “Prohibited Business Solicitation Communications” is defined by s. 420.503(34), F.S.

D. The Respondent further affirms it is in compliance with s. 420.512(5)(c), F.S.

E. The Respondent is in compliance with s. 287.133(2)(a), F.S.

F. The Respondent is in compliance with s. 448.095, F.S.

G. The Respondent understands and agrees to cooperate with any audits conducted in accordance with the provisions set forth in s. 20.055(5), F.S.

H. The Respondent attests, under penalty of perjury, that it does not meet any of the criteria in s. 287.138(2)(a) – (c), F.S.

I. The Respondent attests, under penalty of perjury, that it does not use coercion for labor or services as defined s. 787.06, F.S.

J. Pursuant to s. 119.0701(2)(b), F.S., the Respondent, if awarded a contract under this RFQ, will be required to comply with public records laws, specifically to:

1. Keep and maintain public records required by Florida Housing to perform the service.

2. Upon request from Florida Housing’s custodian of public records, provide Florida Housing with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.

3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to Florida Housing.

4. Upon completion of the contract, transfer, at no cost, to Florida Housing all public records in possession of the contractor or keep and maintain public records required by Florida Housing to perform the service. If the contractor transfers all public records to Florida Housing upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Florida Housing, upon request from Florida Housing's custodian of public records, in a format that is compatible with Florida Housing's information technology systems.

If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor's duty to provide public records relating to this contract, contact the Corporation Clerk at:

Corporation Clerk
227 N. Bronough Street, Suite 5000
Tallahassee, Florida 32301-1329
Phone: 850.488.4197
E-mail: Corporation.Clerk@floridahousing.org

Notwithstanding anything contained herein to the contrary, the provisions and requirements of this paragraph will only apply if and when the Contractor is acting on behalf of Florida Housing.

K. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging in activities in connection with services related to Florida Housing transactions that produce direct or indirect financial gain for the Respondent other than for the compensation agreed upon in the contract that results from this RFQ, unless that Respondent has Florida Housing's written consent after Florida Housing has been fully informed of such activities in writing.

L. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging 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 Respondent will provide written notification (Notice of Conflict of Interest) to Florida Housing's Contract Administrator within 10 working days for review by Florida Housing's Executive Director in consultation with the Ethics Officer. If the Respondent is found to be in non-compliance with this provision, any compensation received in connection with this contract will be subject to forfeiture to Florida Housing.

M. The Respondent, in submitting this Response, acknowledges and agrees that the terms and conditions of this RFQ, as well as any modifications thereto, will be incorporated into any contract offered as a result of this RFQ.

N. CERTIFICATION STATEMENT:

FAILURE TO INCLUDE THE CERTIFICATION STATEMENT LOCATED IN SECTION SIX OF THIS RFQ BEARING AN ORIGINAL SIGNATURE WILL RESULT IN REJECTION OF THE RESPONSE.

SECTION SIX
INFORMATION TO BE PROVIDED IN RESPONSE

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

A. COVER LETTER

Each proposal must 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, and e-mail address of a primary contact person, who will be responsible for day-to-day contact with Florida Housing, and any backup personnel 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 Respondent.

B. GENERAL INFORMATION

1. Provide documentation to show that the Respondent is authorized to do business in the State of Florida.
2. Describe the Respondent's presence in Florida, and ability to be accessible to Florida Housing staff, availability for meetings, conferences, consultation, etc.
3. Describe the Respondent's ability to provide the services requested in Section Four of this RFQ immediately upon award of the contract.
4. Provide a statement of any other qualifications or services, which the Respondent considers to be significant, innovative or otherwise relevant to Florida Housing.

C. QUALIFICATIONS OF PERSONNEL

1. Provide an organizational chart of the key individuals (team members) proposed to be assigned to Florida Housing's account.

2. A descriptions of the key individuals' relevant educational and professional accomplishments.

3. Identify members that have experience State and local HFA cash flow preparation for Single Family indentures and detail their specific qualifications and expertise.

D. EXPERIENCE AND RESOURCES

1. Provide a list of State and Local HFAs for which the Respondent is currently providing services similar to those requested in Section Four of this RFQ. The list should include how long you have provided this service.

2. Has the Respondent ceased to provide these services for a state or local HFA in the past five years? Provide a list of which HFA's and the Respondent no longer provides these services.

3. Describe the Respondent's experience providing the services or engaging in activities as they relate to the work being requested in Section Four of this RFQ.

E. TECHNICAL APPROACH

1. Provide a brief description of the Respondents approach in providing Services in Section Four of the RFQ.

2. Describe the software you will use to prepare Cash flow reports and its compatibility with other software. Specify whether it is internally developed or purchased software.

F. FEES

1. Provide one proposed annual fee to be charged in connection with all of the services described in Section Four of this RFQ.

2. Provide itemized fees for each service described in Section Four, Items A – L.

Fees proposed must include all charges relating to the services required under the contract and all out-of-pocket expenses, such as telephone, postage and shipping, printing and/or copy costs, and travel, if any. No costs will be reimbursed under the contract.

FINAL FEE SCHEDULE WILL BE SUBJECT TO NEGOTIATION.

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G. DRUG-FREE WORKPLACE

If the Respondent has implemented a drug-free workplace program, the Respondent must submit the following certification indicating that it meets all of the requirements of s. 287.087, F.S.:

I hereby certify on behalf of the Respondent, under the terms of RFQ 2026-04, that the Respondent has implemented a drug-free workplace program pursuant to s. 287.087, F.S.

Authorized Signature: _____

Print Name: _____

Print Title: _____

H. MINORITY BUSINESS ENTERPRISE

If the Respondent is a minority business enterprise as defined in s. 288.703, F.S., the Respondent must submit the following certification:

I hereby certify on behalf of the Respondent, under the terms of RFQ 2026-04, that the Respondent is a “minority business enterprise” as defined in s. 288.703(3), F.S.

Authorized Signature: _____

Print Name: _____

Print Title: _____

I. CERTIFICATION (Mandatory Item)

THE FOLLOWING WILL BE REPEATED IN THE RESPONDENT’S RESPONSE AND SIGNED BY AN INDIVIDUAL AUTHORIZED TO BIND THE RESPONDENT. THIS IS A MANDATORY ITEM. FAILURE TO INCLUDE THE CERTIFICATION STATEMENT BEARING AN ORIGINAL SIGNATURE, EXACTLY AS STATED AND WITHOUT ANY ADDITIONS, DELETIONS OR CAVEAT LANGUAGE, WILL RESULT IN REJECTION OF THE RESPONSE.

“I agree to abide by all conditions of RFQ 2026-04 and certify that all information provided in this Response is true and correct, that I am authorized to sign this Response as the Respondent and that I am in compliance with all requirements of the RFQ, including but not limited to, the certification requirements stated in Section Five of this RFQ.”

Authorized Signature (Original)

Print Name and Title

SECTION SEVEN EVALUATION PROCESS

The individual Committee members will independently evaluate the Responses by reviewing the answers to each of the items identified in Section Six of this RFQ and assigning points up to the maximum points allowed for each item. The points available for items in Section Six are to be evaluated are as follows:

<u>Item Reference</u>	<u>Maximum Points</u>
B. General Information.....	5
C. Qualifications of Personnel.....	40
D. Experience and Resources	60
E. Technical Approach	20
F. Fees	20
Total Points Available.....	145

In the event of a tie, Florida Housing will give preference in the award process to the Response certifying a drug-free workplace has been implemented in accordance with s. 287.087, F.S. If a tie continues to exist, Florida Housing will give preference to minority business enterprises as defined in s. 288.703, F.S.

The Committee will conduct one or more public meetings during which members will discuss their evaluations and develop a recommendation or series of recommendations to the Board. The Committee's recommendation will be based on the cumulative scoring and information gathered from the non-scored items. The Board may use the Responses, the Committee's scoring, the non-scored items in the Responses, any other information or recommendation provided by the Committee or staff, and any other information the Board deems relevant in its selection of Respondents to whom to award a contract. ¹

SECTION EIGHT AWARD PROCESS

Florida Housing will provide notice of its decision, or intended decision, for this RFQ 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 s. 120.57(3), F.S. Failure to file a protest within the time prescribed in s. 120.57(3), F.S. or failure to post the bond or other security required by law within the time allowed for filing a bond will constitute a waiver of proceedings under Ch. 120, F.S.

¹ Pursuant to s. 287.05701 F.S., Florida Housing may not request documentation of or consider a vendor's social, political, or ideological interest when determining if the vendor is a responsible vendor. Additionally, Florida Housing may not give preference to a vendor based on the vendor's social, political, or ideological interests.

RFQ 2026-04 - Single Family Cash Flow Providers

		Caine Mitter & Associates 				cfX Incorporated				RBC Capital Markets 			
SECTION SIX ITEM REFERENCE	Max Score	Melanie	Michelle	Kenny	Total	Melanie	Michelle	Kenny	Total	Melanie	Michelle	Kenny	Total
B. General Information	5	5	5	4	14	4	4	3	11	5	5	5	15
C. Qualifications of Personnel	40	37	37	37	111	35	34	32	101	38	38	39	115
D. Experience and Resources	60	57	56	58	171	55	53	56	164	59	58	57	174
E. Technical Approach	20	18	17	18	53	17	17	17	51	18	18	16	52
F. Fees	20	19	14	18	51	19	12	15	46	20	12	19	51
TOTAL POINTS	145	136	129	135	400	130	120	123	373	140	131	136	407
A. Cover Letter	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y	
G. Drug-Free Workplace	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y	
H. Minority Business Enterprise	Y/N	N	N	N		N	N	N		Y	N	N	
I. Certification	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y	

REQUEST FOR QUALIFICATIONS (RFQ) 2026-05
FOR INCLUSION IN A POOL OF ENERGY CONSUMPTION MODEL UTILITY
ALLOWANCE ESTIMATE PROVIDERS
for
FLORIDA HOUSING FINANCE CORPORATION

January 26, 2026

SECTION ONE

INTRODUCTION

Florida Housing Finance Corporation (“Florida Housing”) is soliciting competitive, sealed responses from qualified firms to establish a pool of qualified Energy Consumption Model Utility Allowance Estimate Providers (“Provider”) to calculate utility allowance estimates using an Energy Consumption Model for the owners of affordable housing developments participating in Florida Housing programs in accordance with the terms and conditions set forth in this Request for Qualifications (“RFQ”), and any other term and condition in any contract subsequently awarded. Respondents will be selected and determined through Florida Housing’s review of each response, considering the factors identified in this RFQ. Florida Housing expects to select one or more Respondents that propose to provide all of the services specified in this RFQ.

SECTION TWO

DEFINITIONS

For purposes of this document, the following terms will be defined as follows:

“Board”	The Board of Directors of Florida Housing Finance Corporation.
“Committee”	The review committee composed only of employees of Florida Housing that is established pursuant to Rule 67-49.007, Fla. Admin. Code.
“Contractor”	A person or entity providing the professional services described in Section Four of this RFQ.
“Days”	Calendar days, unless otherwise specified.
“Effective Date”	The date the last party signs the contract that is awarded as a result of this RFQ.
“Energy Consumption Model” or “ECM”	The model used to calculate utility allowance estimates as contemplated and permitted by 26 CFR § 1.42-10(b)(4)(ii)(E).
“Energy Consumption Model Utility Allowance Estimate Provider”	A person or entity submitting a response to this RFQ, who is a Licensed Engineer or Qualified Professional approved by Florida Housing, who has the capability in all respects to perform fully the requirements contained in this RFQ as evidenced by the selection of such person or entity by Florida Housing for inclusion in the pool contemplated by this RFQ.

“Florida Housing”	Florida Housing Finance Corporation, a public corporation and public body corporate and politic created by s. 420.504, F.S.
“Housing Credit Program”	The housing credit program administered by Florida Housing pursuant to Section 42 of the Internal Revenue Code and s. 420.5099, F.S., under which Florida Housing is designated the Housing Credit agency for the state of Florida within the meaning of 26 USC § 42 (h)(8)(A) and Rule Chapters 67-21 and 67-48, F.A.C.
“Licensed Engineer”	A person who is licensed to engage in the practice of engineering under Ch. 471, F.S., or a business organization possessing a certificate of authorization to practice engineering under Ch. 471, F.S.
“Qualified Professional”	Any person or entity who is certified through one of the following programs: Certified Energy Manager®, RESNET®, or the Building Performance Institute, Inc.
“Respondent”	Any person or entity who has the capability in all respects to perform fully the requirements contained in this RFQ, and submits a response to this RFQ.
“Response”	The written submission by a Respondent to this RFQ.
“RFQ”	This RFQ, including all exhibits referenced in this document and all other documents incorporated by reference.
“Website”	The Florida Housing Finance Corporation website, the URL of which is www.floridahousing.org .

SECTION THREE

PROCEDURES AND PROVISIONS

A. Respondents will submit their Response to:

<https://www.floridahousing.org/legal/procurements/RFQ-2026-05-Document-Upload>

Florida Housing must receive the entire Response on or before 2:00 p.m., Eastern Time, on February 18, 2026, as Responses will be opened at that time. Any Responses received after the deadline will be considered non-responsive. One complete copy of the response in PDF format is preferred, unless specified otherwise in Section Six below, and the file name ought to contain a reference to both the solicitation number (RFQ 2026-05) and the name of the Respondent. Please note that the site will ask for the Respondent's contact information and the solicitation number

prior to being able to upload the Response. Florida Housing will not accept a mailed or faxed Response.

B. This RFQ does not commit Florida Housing to award a contract to any Respondent or to pay any costs incurred in the preparation or submission of a Response.

C. All services under the contract awarded are to be performed solely by the Contractor, unless subcontracted or assigned with 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 RFQ;
3. Obtain information concerning any or all Respondents from any source;
4. Request an oral interview before the Board from any or all Respondents;
5. Select for contract negotiation or for award a Response other than (or in addition to) that with the highest score in order to serve the best interests of Florida Housing and the public; and
6. Negotiate with the successful Respondent with respect to any additional terms or conditions of the contract.

E. Any interested party may submit any question regarding this RFQ in writing via e-mail to the Contract Administrator at Contract.Admin@floridahousing.org. All questions must be submitted no later than 2:00 p.m., Eastern Time, on February 4, 2026. Phone calls will not be accepted. Florida Housing expects to respond to all questions in writing by 5:00 p.m., Eastern Time, on February 11, 2026. Florida Housing will post a copy of all questions received and the corresponding answers on Florida Housing's website at:

<http://www.floridahousing.org/legal/procurements/request-for-qualifications>.

Only written responses or statements from the Contract Administrator that are posted on our website will bind Florida Housing. No other means of communication, whether oral or written, may be construed as an official response or statement from Florida Housing.

F. Between the release of the solicitation and the end of the 72-hour period following the posting of the notice of intended award, respondents to this solicitation or persons acting on their behalf may not contact any member of Florida Housing's Board of Directors or any Florida Housing employee concerning any aspect of this solicitation, except in writing to the Contract Administrator. Violation of this provision may be grounds for rejecting a response.

G. Any person who wishes to protest the specifications of this RFQ must file a protest in compliance with s. 120.57(3), F.S., and Rule Ch. 28-110, Fla. Admin. Code. Failure to file a protest within the time prescribed in s. 120.57(3), F.S., will constitute a waiver of proceedings under Ch. 120, F.S.

H. The term of the contract will be for three years, subject to satisfactory performance at the sole discretion of Florida Housing. If the parties mutually agree in writing, the contract may be renewed once for an additional three years.

I. Florida Housing is not required to use the services of any selected Contractor or to assign any work to such provider, and may terminate the contract with any selected Contractor without cause and without penalty.

J. Pursuant to Rule 67-49.004, Fla. Admin. Code, Florida Housing may modify the terms of the RFQ at any point prior to the due date for Responses. A notice of such modification will be posted on Florida Housing's Website. Any Respondent will have at least seven days from the date of the posting of the notice of the modification to submit or modify its Response.

K. The terms of this RFQ, and any modifications thereto, will be incorporated into any contract offered as a result of this RFQ. Failure of a successful Respondent to accept these obligations in the final contract may result in cancellation of the award.

L. By submitting a Response to this RFQ, the Respondent agrees that any resulting contracts or agreements (and any attachments, exhibits, and amendments) may be executed and delivered by electronic signatures. As used herein, the term "electronic signatures" shall have the meaning in s. 668.50, F.S.

SECTION FOUR

SCOPE OF SERVICES

Florida Housing is designated the housing credit agency for the state of Florida under 26 USC § 42 (h)(8)(A). When utilities for a residential rental unit are paid directly by the tenant, the inclusion of a utility allowance in the gross rent of rent-restricted units is required by 26 USC § 42(g)(2)(B)(ii). A building owner, in accordance with 26 CFR § 1.42-10(b)(4)(ii)(E), may calculate utility estimates using an energy and water and sewage consumption and analysis model (energy consumption model). The energy consumption model must, at a minimum, take into account specific factors including, but not limited to, unit size, building orientation, design and materials, mechanical systems, appliances, and characteristics of the building location. Florida Housing may approve or disapprove of the energy consumption model utility allowance estimate or require information before permitting its use.

The utility consumption estimates must be calculated by a properly licensed engineer or other qualified professional approved by Florida Housing, which has jurisdiction over owners of developments in Florida that participate in the Housing Credit Program and other affordable housing programs financed by Florida Housing. The qualified professional and the building owner must not be related within the meaning of 26 USC §§ 267(b) or 707(b). 26 CFR § 1.42-10(c)

provides that the building owner must pay for all costs incurred in obtaining the utility estimates and providing the estimates to Florida Housing and the tenants.

Energy Consumption Model Utility Allowance Estimate Providers must:

A. Use an Energy Consumption Model (ECM) that at a minimum, takes into account specific factors including, but not limited to unit size, building orientation, design and materials, mechanical systems, appliances, and characteristics of the building location;

B. Be either a properly Licensed Engineer or a Qualified Professional approved by Florida Housing (together, Qualified Professional) and the Qualified Professional and the building owner must not be related within the meaning of 26 USC §§ 267(b) or 707(b);

C. Otherwise comply in all respects with 26 CFR § 1.42-10(b)(4)(ii)(E), and any other applicable regulations;

D. Execute and submit to the owner the *Certification of Completeness and Accuracy for Energy Consumption Model (ECM) Utility Allowance Estimate (Version 5/2019)* form, a sample of which is available at <https://www.floridahousing.org/legal/procurements/request-for-qualifications> under the listing for this RFQ;

E. Provide the owner with an ECM study that states the effective date of the utility rates and clearly delineates customer service charges, base rates, volume charges, volume discounts, taxes, surcharges and franchise fees, where applicable, to document the utility estimates calculated for each Building Identification Number (BIN); clearly indicating, if applicable, any sub-metered system operated by the owner; and

F. Provide the owner with a letter that explains how the specific factors in Section Four, Item A., were accounted for in the Energy Consumption Model.

SECTION FIVE CERTIFICATION

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

A. The Respondent 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 will 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 RFQ is a public record pursuant to Ch. 119, F.S., and subject to examination upon request, but only after Florida Housing provides a notice of decision pursuant to s. 120.57(3), F.S., or within 30 days after the Response is opened, whichever is earlier.

C. The Respondent, if awarded a contract under this RFQ, will comply with s. 420.512(5), F.S. For the purpose of s. 420.512(5), F.S., “Prohibited Business Solicitation Communications” is defined by s. 420.503(34), F.S.

D. The Respondent further affirms it is in compliance with s. 420.512(5)(c), F.S.

E. The Respondent is in compliance with s. 287.133(2)(a), F.S.

F. The Respondent is in compliance with s. 448.095, F.S.

G. The Respondent understands and agrees to cooperate with any audits conducted in accordance with the provisions set forth in s. 20.055(5), F.S.

H. The Respondent attests, under penalty of perjury, that it does not meet any of the criteria in s. 287.138(2)(a) – (c), F.S.

I. The Respondent attests, under penalty of perjury, that it does not use coercion for labor or services as defined s. 787.06, F.S.

J. Pursuant to s. 119.0701(2)(b), F.S., the Respondent, if awarded a contract under this RFQ, will be required to comply with public records laws, specifically to:

1. Keep and maintain public records required by Florida Housing to perform the service.

2. Upon request from Florida Housing’s custodian of public records, provide Florida Housing with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in this chapter or as otherwise provided by law.

3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to Florida Housing.

4. Upon completion of the contract, transfer, at no cost, to Florida Housing all public records in possession of the contractor or keep and maintain public records required by Florida Housing to perform the service. If the contractor transfers all public records to Florida Housing upon completion of the contract, the contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the contractor keeps and maintains public records upon completion of the contract, the contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to Florida Housing, upon request from Florida Housing’s custodian of public records, in a format that is compatible with Florida Housing’s information technology systems.

If the Contractor has questions regarding the application of Chapter 119, Florida Statutes, to the Contractor's duty to provide public records relating to this contract, contact the Corporation Clerk at:

Corporation Clerk
227 N. Bronough Street, Suite 5000
Tallahassee, Florida 32301-1329
Phone: 850.488.4197
E-mail: Corporation.Clerk@floridahousing.org

Notwithstanding anything contained herein to the contrary, the provisions and requirements of this paragraph will only apply if and when the Contractor is acting on behalf of Florida Housing.

K. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging in activities in connection with services related to Florida Housing transactions that produce direct or indirect financial gain for the Respondent other than for the compensation agreed upon in the contract that results from this RFQ, unless that Respondent has Florida Housing's written consent after Florida Housing has been fully informed of such activities in writing.

L. The Respondent acknowledges that if awarded a contract it will be prohibited from engaging 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 Respondent will provide written notification (Notice of Conflict of Interest) to Florida Housing's Contract Administrator within 10 working days for review by Florida Housing's Executive Director in consultation with the Ethics Officer. If the Respondent is found to be in non-compliance with this provision, any compensation received in connection with this contract will be subject to forfeiture to Florida Housing.

M. The Respondent, in submitting this Response, acknowledges and agrees that the terms and conditions of this RFQ, as well as any modifications thereto, will be incorporated into any contract offered as a result of this RFQ.

N. CERTIFICATION STATEMENT:

FAILURE TO INCLUDE THE CERTIFICATION STATEMENT LOCATED IN SECTION SIX OF THIS RFQ BEARING AN ORIGINAL SIGNATURE WILL RESULT IN REJECTION OF THE RESPONSE.

SECTION SIX

INFORMATION TO BE PROVIDED IN RESPONSE

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

A. COVER LETTER

Each proposal must 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, and e-mail address of a primary contact person, who will be responsible for day-to-day contact with Florida Housing, and any backup personnel 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 Respondent.

B. GENERAL INFORMATION

1. Provide documentation to show that the Respondent is authorized to do business in the State of Florida. If the Respondent is not a legal entity (e.g., an individual or sole proprietorship), provide a copy of the Respondent's business license issued by the local jurisdiction in Florida in which the Respondent conducts business.

2. Describe the Respondent's ability to provide the services outlined in Section Four of this RFQ and why Respondent is qualified to act as an Energy Consumption Model Utility Allowance Estimate Provider to owners of developments funded by Florida Housing.

3. Describe the Respondent's methodology in developing an Energy Consumption Model Utility Allowance Estimate. Provide a sample Energy Consumption Model Utility Allowance Estimate for a proposed rental housing development and a description of the platform(s) used as the basis for your energy consumption model (i.e., Excel model, whole building simulations). Identify the factors considered in your analysis, such as unit size, building orientation, design and materials, mechanical systems, control systems, appliances, interaction effects between building systems, building location characteristics, weather, occupancy, metering characteristics, comparison to similar buildings or building codes, and utility rate schedules. Note: This may not be a comprehensive list of relevant factors or variables, so please identify any additional factors or variables that may be considered in your analysis.

4. **(Mandatory Item)** Provide copies of the certificate(s) or license(s), as applicable, evidencing that the Respondent and/or staff who will be performing the Energy Consumption Model Utility Allowance Estimate Provider services is a Qualified Professional or is a Licensed Engineer. Note: Failure to include these items will result in rejection of the response.

C. EXPERIENCE

1. Describe the Respondent's experience in conducting affordable housing utility allowance estimates.

2. Provide information on any contract entered into within the last 10 years by the Respondent to provide services similar to those described in Section Four of this RFQ.

3. Provide information on any contract entered into by the Respondent to provide services similar to those described in Section Four of this RFQ that was terminated prior to completion in the last five years. Provide details of such circumstances.

D. QUALIFICATIONS OF PERSONNEL

Provide individual resumes describing relevant degrees, certifications, or experience, no more than five pages in length each, of staff who will be performing the Energy Consumption Model Utility Company Estimate Provider services.

E. FEES

1. Where indicated in Table 1 below, provide the proposed fees for each item, assuming that the sample development is comprised of 100 units. Note: Florida Housing will not accept caveat language. Responses that include caveat language will receive a total score of zero for this section.

2. Fees proposed must include all charges relating to the services required under the contract, including all out-of-pocket expenses, such as telephone, postage and shipping, printing and/or copy costs, and travel, if any.

TABLE 1 FEES	
Service	Fee (Development)
Item #1- Initial Verification of Data for Energy (Electric, Gas) Allowance Modeling	\$
Subtotal – Item #1 (A)	
Item #2 – Initial Verification of Data for Water/Sewer Allowance Modeling	\$
Subtotal – Item #2 (B)	
Item #3 – Annual Allowance Update (Energy)*	\$
Subtotal – Item #3 (C)	
Item #4 – Annual Allowance Update (Water/Sewer)*	\$
Subtotal – Item #4 (D)	
TOTAL (A+B+C+D) =	\$

*Fees for Items #3 and 4 assume no changes from initial data.

F. DRUG-FREE WORKPLACE

If the Respondent has implemented a drug-free workplace program, the Respondent must submit the following certification indicating that it meets all of the requirements of s. 287.087, F.S.:

I hereby certify on behalf of the Respondent, under the terms of RFQ 2026-05, that the Respondent has implemented a drug-free workplace program pursuant to s. 287.087, F.S.

Authorized Signature: _____

Print Name: _____

Print Title: _____

G. MINORITY BUSINESS ENTERPRISE

If the Respondent is a minority business enterprise as defined in s. 288.703, F.S., the Respondent must submit the following certification:

I hereby certify on behalf of the Respondent, under the terms of RFQ 2026-05, that the Respondent is a “minority business enterprise” as defined in s. 288.703(3), F.S.

Authorized Signature: _____

Print Name: _____

Print Title: _____

H. CERTIFICATION (Mandatory Item)

THE FOLLOWING WILL BE REPEATED IN THE RESPONDENT’S RESPONSE AND SIGNED BY AN INDIVIDUAL AUTHORIZED TO BIND THE RESPONDENT. THIS IS A MANDATORY ITEM. FAILURE TO INCLUDE THE CERTIFICATION STATEMENT BEARING AN ORIGINAL SIGNATURE, EXACTLY AS STATED AND WITHOUT ANY ADDITIONS, DELETIONS OR CAVEAT LANGUAGE, WILL RESULT IN REJECTION OF THE RESPONSE.

“I agree to abide by all conditions of RFQ 2026-05 and certify that all information provided in this Response is true and correct, that I am authorized to sign this Response as the Respondent and that I am in compliance with all requirements of the RFQ, including but not limited to, the certification requirements stated in Section Five of this RFQ.”

Authorized Signature (Original)

Print Name and Title

SECTION SEVEN EVALUATION PROCESS

The individual Committee members will independently evaluate the Responses by reviewing the answers to each of the items identified in Section Six of this RFQ and assigning points up to the maximum points allowed for each item. The points available for items in Section Six are to be evaluated are as follows:

<u>Item Reference</u>	<u>Maximum Points</u>
B. General Information.....	20
C. Experience.....	30
D. Qualifications of Personnel.....	30
E. Fees.....	20
Total Points Available.....	100

For the Fee Section, the Respondent with the lowest proposed total fee will receive the maximum allowable points (20 points). The remaining respondents will receive a percentage of the maximum points, rounded to the nearest whole number, based on the following formula:

Lowest Proposed Total Fee ÷ Current Respondent's Proposed Total Fee	=	%	x	20	=	Total Points Awarded for "Fees" (Rounded to the nearest whole number)
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In the event of a tie, Florida Housing will give preference in the award process to the Response certifying a drug-free workplace has been implemented in accordance with s. 287.087, F.S. If a tie continues to exist, Florida Housing will give preference to minority business enterprises as defined in s. 288.703, F.S.

The Committee will conduct one or more public meetings during which members will discuss their evaluations and develop a recommendation or series of recommendations to the Board. The Committee's recommendation will be based on the cumulative scoring and information gathered from the non-scored items. The Board may use the Responses, the Committee's scoring, the non-scored items in the Responses, any other information or recommendation provided by the Committee or staff, and any other information the Board deems relevant in its selection of Respondents to whom to award a contract. ¹

¹ Pursuant to s. 287.05701 F.S., Florida Housing may not request documentation of or consider a vendor's social, political, or ideological interest when determining if the vendor is a responsible vendor. Additionally, Florida Housing may not give preference to a vendor based on the vendor's social, political, or ideological interests.

SECTION EIGHT
AWARD PROCESS

Florida Housing will provide notice of its decision, or intended decision, for this RFQ 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 s. 120.57(3), F.S. Failure to file a protest within the time prescribed in s. 120.57(3), F.S. or failure to post the bond or other security required by law within the time allowed for filing a bond will constitute a waiver of proceedings under Ch. 120, F.S.

RFQ 2026-05 - Pool of Energy Consumption Model Utility Allowance Estimate Providers

		Alan Plummer and Associates, Inc. ★				Core Consultants of America, LLC ★				Energy Consulting, Inc. ★				Stowers Consulting, Inc. dba Green Summit Engineering and dba Green Summit ★			
SECTION SIX ITEM REFERENCE	Max Score	Matt	Joketra	George	Total	Matt	Joketra	George	Total	Matt	Joketra	George	Total	Matt	Joketra	George	Total
B. General Information	20	20	18	20	58	15	17	18	50	15	20	20	55	15	18	18	51
C. Experience	30	30	28	30	88	20	28	20	68	25	30	30	85	25	28	30	83
D. Qualifications of Personnel	30	30	28	30	88	25	28	25	78	27	30	30	87	25	29	30	84
E. Fees	20	2	2	2	6	6	6	6	18	20	20	20	60	7	7	7	21
TOTAL POINTS	100	82	76	82	240	66	79	69	214	87	100	100	287	72	82	85	239
A. Cover Letter	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y		Y	Y	Y	
B.4. General Information	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y		Y	Y	Y	
F. Drug-Free Workplace	Y/N	Y	Y	Y		N	N	N		Y	Y	Y		Y	Y	Y	
G. Minority Business Enterprise	Y/N	N	N	N		N	N	N		N	N	N		Y	Y	Y	
H. Certification	Y/N	Y	Y	Y		Y	Y	Y		Y	Y	Y		Y	Y	Y	