

Description of Intended Single Source Purchase

AGENCY: Florida Housing Finance Corporation

TITLE: Hardest Hit Fund Program Manager

CONTACT: Contracts Manager
227 N. Bronough Street, Suite 5000
Tallahassee, FL 32301
(850) 488-4197
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Date Posted: July 27, 2015

Time Posted: 9:35 a.m.

Term: September 22, 2015 – September 21, 2016

Performance and/or Design Requirements: At least three (3) years' program manager experience is required in one or more of Florida's Hardest-Hit Fund Programs: Unemployment Mortgage Assistance Program, Mortgage Loan Reinstatement Program, Principal Reduction Program, Modification Enabling Program, Elderly Mortgage Assistance Program, and Down Payment Assistance Program. This experience must include detailed knowledge of eligibility requirements, underwriting process, and funding for each program. Contractor is responsible for independent managerial work assisting in the coordination of tasks and/or assignments with respect to the Housing Finance Agency Innovation Fund for the Hardest-Hit Housing Markets (Hardest-Hit Fund or HHF). The Contractor performs administrative activities, which involve independent planning, administrative objectives and priorities as related to the Hardest-Hit Fund) including:

- Assists in the development of Hardest-Hit Fund guidelines and procedures for all above mentioned programs as well as other materials for the implementation and administration of the program with the assistance of both the Director and Assistant Director of Homeownership Programs.
- In conjunction with the development of procedures and guidelines contractor must also help conduct trainings and participate in conferences, workshops, seminars, and similar activities relevant to the assigned area of functional responsibility. Must have experience in developing training materials, utilizing training equipment, and conducting trainings for both advisor agencies and underwriters on Florida's specific Hardest-Hit Fund programs.
- Must have a specific, working knowledge of the data bases used by Florida applicants, advisors and underwriters, including the ability to create specific reports in the Florida-specific CounselorDirect system. Assists in developing and reviewing Statements of Work

for any upgrades or enhancements needed in CounselorDirect for all Florida-specific HHF programs.

- Coordinates the implementation of new mortgage loan servicers (servicers) for all applicable Florida-specific HHF programs including execution of the Participation Agreement, training new servicers on all programs, assisting with the electronic file transfer and coordinating the monthly payments.
- Utilizes the common data file for all loan level information provided to and from the servicers for all Florida-specific HHF programs.
- Prepares all funding disbursements to servicers for all Florida-specific HHF programs.
- Utilizes Sharefile and SFTP for all secure transfers between FHFC and the servicers.
- Provides technical assistance on the Hardest-Hit Fund to all stakeholders including servicers, advisor agencies, local governments, and the general public. Distributes Hardest-Hit Fund information to interested persons. Consults with compliance monitors and attorneys as needed.
- Maintains and reconciles the Hardest-Hit Fund expenditures for all Florida-specific HHF programs including disbursements and administrative expenditures.
- Coordinates the development, processing, and reconciliation of quarterly performance reports for all Florida-specific HHF programs. Creates these reports using the CounselorDirect system and, after approval, submits them to the US Treasury.
- Assists the Assistant Director and Director of Homeownership Programs and the Communications staff in the development and implementation of marketing initiatives for the Hardest-Hit Fund.
- Assists staff of Quality Assurance, HHF Compliance and the Inspector General's Office in monitoring compliance with Hardest-Hit Fund requirements.
- Assists the Assistant Director and, the Director of Homeownership Programs and Legal Staff in any appeals or challenges received in relation to the Hardest-Hit Fund.
- Performs special assignments, research and report preparation in relation to all Florida-specific HHF programs as assigned.

Intended Source: RCL Consulting and Management, Inc.

Estimated Dollar Amount: \$89,830

Justification for Single Source Acquisition:

The Housing Finance Agency Innovation Fund for the Hardest Hit Housing Markets (“Hardest Hit Fund” or “HHF”) is a federal program that Florida Housing has had for over four years now. The program is set to end on December 31, 2017.

Florida Housing has contracted with Lainie Lowery of RCL Consulting, Inc., since September, 2010 to provide assistance with both the implementation and continued management of each of the five separate programs that make up Florida’s total HHF Program. These four years of experience have given Ms. Lowery a unique skill set that we are unable to procure from any other person. These skills include:

- The detailed knowledge of and the continued development and management of the Florida-specific Hardest-Hit Fund databases provided by the vendor CounselorDirect. This includes development of two application portals to be used by the residents of Florida with a coinciding interface to be utilized by contract advisors during eligibility determinations, an underwriting database used by staff and contracted underwriters for review of all files, and a reporting database.
- The ability to effectively use the Florida-specific CounselorDirect system to create and reconcile Quarterly Performance Reports (QPR) required by the U.S. Treasury.
- Both the historical and continuing knowledge and ability to effectively communicate with mortgage loan servicers about Florida-specific HHF programs and the ability to complete the Common Data File and transmit it to servicers in order to effectuate the transfer of HHF funds on behalf of qualified borrowers.
- Both the historical and continuing knowledge to revise current Florida-specific HHF programs or implement new programs as may be necessary from time to time. Such changes, when they occur, include assistance with revising or creating term sheets, policies, procedures and rules as well as training all appropriate staff and contractors.
- Both the historical and continuing knowledge to prepare for and participate in compliance reviews and audits conducted by various state and federal agencies with oversight of HHF and Florida Housing.

Approved By: Florida Housing Finance Corporation’s Executive Director, Stephen P. Auger

This Description of Intended Single Source Purchases is posted in accordance with Rule 67-49.0031, Florida Administrative Code. Prospective vendors are requested to provide information regarding their ability to supply the commodities or contractual services described. If the Executive Director, after reviewing any information received from prospective vendors, determines that the commodities or contractual services are practically available from a single source, the Corporation shall provide notice of its intended decision to enter into a single-source purchase contract in the manner specified in Section 120.57(3), Fla. Stat.