

Request for Qualifications and Proposals for LIHTC and MHDC Funds Management Software and Data Migration



Required by

Missouri Housing Development Commission

RESPONSES DUE:

No later than 5:00 PM on May 26, 2026

SUBMIT RESPONSES TO:

Denise Greenbaum
dgreenbaum@mhdc.com

I. INTRODUCTORY INFORMATION

The Missouri Housing Development Commission (“MHDC”) was established in 1969 in order to increase the availability of decent, safe, and sanitary housing at prices within the means of low and moderate-income persons. MHDC is a governmental instrumentality of the state of Missouri and a body corporate and politic. MHDC’s authority is derived from Section 215.030, et seq., of the Revised Statutes of Missouri, as amended and supplemented.

Through its Rental Production Department, MHDC administers a variety of state and federal funding sources to finance the construction and rehabilitation of affordable rental housing for low-income Missourians. Funding is made available through a combination of issuing tax credits and tax-exempt bonds, providing grants, and making low-interest loans. Sources include the Federal Low Income Housing Tax Credits, Missouri Low Income Housing Tax Credit, HOME Investment Partnership Program, federal Risk-Share insurance, National Housing Trust Fund, and the Affordable Housing Assistance Program, as well as the Commission’s own general fund balances. The Commission’s rental production activities are governed by the laws and regulations of each particular funding source as well as Commission policy.

A. PURPOSE OF RFQ

The purpose of this Request for Qualifications (“RFQ”) is to obtain statements of qualifications (“Responses”) from qualified entities (“Respondent” or “Respondents”) to furnish a Low-Income Housing (“LIHTC”) and MHDC Funds Management Software system with data migration. The Responses will be used to identify and retain an appropriate system.

B. ANTICIPATED TIMETABLE FOR RFQ AND PROPOSALS

Release RFQ	May 4, 2026
Deadline to Submit Questions	May 14, 2026
Proposals Due	May 26, 2026
Evaluation Committee Recommendation	June 12, 2026

II. TERMS AND CONDITIONS GOVERNING THIS RFQ

A. DEFINITIONS

Best Value Contracting

The award of a contract to one or more qualified Respondents is based not solely on the lowest price, but rather on an analysis of multiple factors including but not limited to price, quality of work, capacity, experience and references.

Commission

MHDC’s Board of Commissioners.

Final Contract

Any contract ultimately negotiated and entered into by and between MDHC and a successful Respondent pursuant to an award under this RFP.

MHDC

The Missouri Housing Development Commission.

Proposal

Proposal refers to the complete response, including any exhibits or attachments, submitted by a Respondent in response to this RFQ.

Respondent

Respondent refers to any entity submitting a response to this RFQ.

RFQ

This Request for Qualifications and Proposals.

Scope of Work

Scope of Work refers to the instructions and requirements stated in this RFP or portions thereof and any additional supplementary instructions that are developed, published or distributed in connection with this RFP.

Selected Party

The Respondent whose Proposal MHDC accepts in accordance with this RFQ.

Standards of Conduct

The Standards of Conduct adopted by the Commission on July 31, 2009, and revised on April 29, 2016, a copy of which is available on MHDC's website at <https://mhdc.com/about-us/policies/> as may be further modified by the Commission.

State

The State of Missouri.

Will, Must, and Shall

The use of the terms "must," "will," and "shall" indicate mandatory items and instructions with which Respondents are required to comply.

B. Scope of Services

PROJECT MANAGEMENT

- Project management should include:
 - Data conversion and integration from existing system(s)
 - Installation of required hardware and software
 - Training of key employees
 - Successful implementation and testing of the software and hardware in the agency network infrastructure

FUNCTIONAL REQUIREMENTS

- Installation, Software Maintenance, and Technical Support

- Installation must follow industry standard with milestones and user acceptance testing
- Software patches, upgrades and installation support are included in the annual maintenance
- Continuing technical support for issues with the system
- Mandatory changes to processes and calculations, as required by HUD, the IRS, other federal entities, or the state of Missouri, will be provided in a timely manner and at no cost
 - Including: Additions to functionality based on Industry Standard Use Case or Industry Requirement reporting or tracking changes
- Functionality for MHDC only, not Industry Standard Use Case or Industry Requirement
 - Identify Pricing Structure
 - Identify Process to request and identify MHDC only issue
 - Include up to 4 requests in Annual Maintenance
 - Customization, Reports, etc.
- Data Migration/Integration
 - Data Conversion to include conversion of all historical data
 - MHDC currently uses Emphasys and 2 custom software packages
- Training
 - Training of staff to include End-User, Intermediate-User, Train-the Trainer, and technical level training, sufficient for staff to operate independently
 - The selected vendor must permit the audio and video recording of onsite/remote training and/or provide ongoing access to a vendor-maintained library with comparable training materials
- User Interface and Basic Functions
 - Interface is designed with user experience in mind
 - Navigation must be intuitive. Application, Allocation, Compliance, Property, Contact information, Funding, Financials, and Reports are easily accessed
 - Integration with Microsoft Office 365
 - Primarily export to Word, Excel, or PDF
 - Search features should be filterable, user-friendly, fully featured, and robust

SOFTWARE CAPABILITIES

ALLOCATION

- Capture required Development information (including Tax Identification information):
 - Ownership
 - Funding Requested and Funding Approved Type and Amount
 - MHDC funding types are identified in Exhibit A
 - Development Costs
 - Development Budget
 - Utility information
 - Site or Development information
 - Location

- Size of Development
 - Building information
 - Unit information
 - External or additional financing
 - Non-Profit information
- Tax Credit / Development
 - Calculate, generate, and edit 8609s and Missouri Eligibility Statements (MOST)
 - Preferred: Generate 8610
 - Generate 42M Letter (4% LIHTC/Tax Exempt Bonds)
 - Development, Building, and Unit set-up for developments
 - Timeline/Benchmark Management
 - Award Tracking and Management – LIHTC (9% and 4%), State LIHTC, HOME, NHTF, Fund Balance, TCAP, Tax Exempt Bonds
 - Federal and State Awards
 - Track and Manage Allocation Pool(s)
 - Fiscal and Calendar year Allocations
 - Capture Development Characteristics
 - Basis Boost Designation (QCT, DDA, State DDA)
 - Qualified and Eligible Basis Calculations per Development and per Building
 - Applicable Fraction Calculations per Unit and per Square Footage
 - Ability for users to upload documents and manage content
 - i.e. Cost Certification forms and management
 - Possible Integration with DocuWare
 - Track Carryover date
 - 10% Test
 - Track Accelerated Credits per Development/Building
- HOME (HUD)
 - Preferred: Integration with IDIS

CONSTRUCTION DISBURSEMENT MANAGEMENT

- Track Draw Progress from closing through conversion
- Internal notes/notification for each development
- Developer Submissions
 - Track and report on Draws
 - Create and track Escrow accounts per development and globally
 - Closing and Conversion items and status
 - Latent defect tracking and reporting
 - Communicate and comment on submissions
 - Insurance requirement tracking from construction through compliance
 - Easily identify data, timelines, notifications; possibly on a dashboard
 - Track and report payroll per Davis- Bacon
- 3rd Party Inspector access

- Upload Documents
- Track substantial completion
- Add notes and notifications to development
- Calculate and track Disbursement Schedule
- Track Contractor Advance
 - Track retention, general requirements, overhead, profit percentage, etc.

COMPLIANCE

- Preferred: Track Cut-off Dates for Loans, Initial Equity for Loans
- Track 1st Unit Turned
- Track Building Placed in Service
- Track Extended Use Period Start and End Dates
- Track HOME Affordability Start and End Dates
- Track other funding or program Start and End Dates as required
- Tax Credit Properties / Compliance
 - Low Income Housing Tax Credit Administration
 - PBV (Project Based Vouchers) Flag-TBD
 - Building/Unit Administration
- Property should be able upload or complete Annual Owner Certification
- Property should be able to upload or complete Tenant Income Certifications (TIC)
 - MHDC should be able to test the TIC against Program Guidelines
 - TIC test should include Rent and Income testing based on Unit definition and Tenant characteristics
 - TIC test should include the Next Available Unit Rule (NAUR)

INSPECTIONS

- Inspections
 - NSPIRE Inspections
 - Mobile inspections (phone or tablet) for NSPIRE
 - Do Inspections offline (with no Internet)
 - Add results later if paper is used for Inspection
- Physical and File Inspections
 - Based on Program parameters
 - Service Enriched, Special Needs, HOME, LIHTC, etc.
- Schedule Inspections for developments based on location and number of units
 - Track Inspection Frequency based on Funding parameters
- Customize for Missouri based on State Law or Funding Type
 - MHDC funding types are identified in Exhibit A
- MHDC may have multiple or third-party inspectors on an inspection
 - The final inspection report should be one report for the property

INTEGRATION

- MHDC Integration for Agency Custom Development
 - MAAP (Multifamily Application and Administration Portal)

- Line by Line Costs
 - Property information
- AMRS (Asset Management Reporting System)
 - Inspection Results
 - 8823 information (TBD)
 - Last Building Placed in Service
 - EUP Dates
- Integration with DocuSign and other signatory services
- Integration with DocuWare

PROJECT BASED VOUCHERS

- Housing Choice Vouchers / Section 50058
 - Project Based Voucher Tenant Management
 - Comprehensive Reporting (including but not limited to)
 - Leasing percentage reports
 - Voucher count reports
 - Informal/Formal Grievance Hearing Tracking with extraction/reporting capabilities
 - RACS Submission/Reporting (50059 forms)

REPORTING

- Reporting for Missouri Sunshine Law requests and Freedom of Information Act requests
- Comprehensive reporting for all modules and functions
 - Active Portfolio
 - Based on Funding, Compliance status
 - Based on Developments, Buildings, Units
 - Based on Location (County, City, Region, Legislative District)
- Easily create in-house custom reports
- Access to view SQL stored procedures and create new ones
- Integration with dashboards
- HUD, IRS, NCSHA specific, formatted reports
- Ability to extract/export data from any module or grid

APPLICATION (May be considered as a Phase 2 implementation)

- Items in the Application section may have additional data points
- Online applications submission for multifamily housing developments
 - Ability to open and close application rounds and accept applications multiple times per year
 - Developer can submit more than one application in a funding cycle
- Application could include multiple funding types
 - MHDC funding types are identified in Exhibit A
 - Application requirements vary depending on funding type requested
- Application should be configurable to meet MHDC requirements
 - MHDC Application (FIN-100) is available at <https://mhdc.com/>
- Capture required Development information (including Tax Identification information):
 - Funding Requested and Funding Approved Type and Amount

- MHDC funding types are identified in Exhibit A
 - Development Budget/Costs
 - Development Sources
 - Financing types and terms
 - Utility information
 - Site Information
 - Location – multiple sites possible
 - Size of Development
 - Building information
 - Multiple buildings possible
 - Square footage
 - Type of space, including residential, commercial, community service, amenities
 - Unit information, including details such as square footage, rent, utility amount, subsidy
 - Ability to link units to building and site
 - Operating Budget
 - Development Team member information
 - Pro Forma, with calculations generated based on application data and automated calculation standards
- Tax Credit calculations, including Eligible Basis, Qualified Basis, Applicable Fraction
- Computations, including gross income, net income, debt service, cash flow, DCR/ECR
- Ability to accept and organize attachments

TECHNICAL ADMINISTRATION

- Administration of the system is easily configurable in a ‘point and click’ style interface
- Administration can be done by internal IT Staff rather than requiring an expert consultant
- Describe the system’s abilities with fail-over, redundancy and disaster recovery
- Describe the benefits and disadvantages of your on-premises solution and/or your cloud services
- Define user and group rights and privileges and security restrictions that can be placed on files and functions
- Implementation
 - Explain, in general terms, what your company’s responsibilities are and what MHDC’s responsibilities will be during the implementation process
 - Describe your method of training for both end-users and technical staff (system administrators)

COSTS

- Please provide a detailed breakout of costs, including implementation, one-time costs, ongoing costs, support costs, hosting costs (if cloud-based), etc.
 - All costs must be separately delineated
- Include estimated costs for annual maintenance and future version upgrades
 - Please include a 5-year total Cost of Ownership (TCO)
- Include information about annual increases, historical and projected

- Include five free attendee registrations for the first annual conference that occurs during or following implementation
- Include 2 attendee registrations each year with annual maintenance

METHOD OF SUPPORT

- Describe in detail what levels of user and technical support we can expect following the completion of implementation and training
- Describe release frequency of upgrades, updates and patches
 - Include costs involved outside of Annual Maintenance
 - Include Level of Effort anticipated from MHDC
- Describe response time and completion time for requests based on:
 - Industry change or requirement
 - MHDC request for change
 - Functionality error
 - Data error
 - Training issue

ADDITIONAL QUESTIONS

- What differentiates you from your key competitors?
- What is Roadmap for your software for the next 5 years?
 - What functionality is planned?
 - What are platform update requirements?

C. TERM OF SERVICE

MHDC anticipates that the selected entity will be retained on a perpetual basis soon after selection on or around June 2026.

MHDC reserves the right, at its sole discretion, to end the term of service for any Respondent selected pursuant to this RFQ, at any time prior to the expiration of the stated term of service. This right reserved to MHDC to remove a firm is a unilateral right in the sole discretion of MHDC and may be undertaken at any time with or without cause. Selection of a firm to be added at such time may be made from Responses to this RFQ or pursuant to such other selection process as MHDC shall determine at that time.

D. STANDARDS OF CONDUCT

This RFQ is considered a “Competitive Matter” as that term is defined in the Standards of Conduct. Further, every Respondent, including, but not limited to, their respective principals, key employees and agents acting on their behalf are considered “Interested Parties” (as defined in the Standards of Conduct). As a result, all Interested Parties under this RFQ are obligated to abide by the rules and restrictions imposed by the Standards of Conduct, including the rules governing contact with Commissioners, MHDC employees, former Commissioners, and former employees. The failure of any Interested Party to abide by the rules and restrictions established by the Standards of Conduct may result in the disqualification of the Respondent’s Response. Therefore, Respondents are strongly encouraged to review and ensure

compliance with the Standards of Conduct Policy, which can be found on the MHDC website: <https://mhdc.com/>.

Furthermore, pursuant to the Standards of Conduct, any Response under this RFQ shall disclose the name of the individual, entity and/or entities having ownership interests in the Respondent entity. All entities identified in this disclosure shall be reduced to their human being level irrespective of the number of entity layers that may be present for any disclosed entity. Notwithstanding the previous sentence, to the extent any Respondent under this RFQ is a publicly traded corporation, such a Respondent may limit this disclosure to all board members, officers (and other key employees) and any shareholders owning or controlling ten percent (10%) or more of the corporation. Questions regarding this requirement or any other requirements or restrictions imposed by the Standards of Conduct may be directed to the Commission's General Counsel, Anne Powell, by phone at 314-877-1373 or email at apowell@mhdc.com.

E. DIVERSITY, EQUITY, AND INCLUSION (DEI) AND ENVIRONMENTAL, SOCIAL, AND GOVERNANCE (ESG)

As an instrumentality of the state of Missouri, MHDC complies with the principle of equal protection found in the United States and Missouri Constitutions and is dedicated to non-discrimination in a manner consistent with state and federal laws along with applicable executive orders to further rules, policies, business, and employment practices and actions that treat all persons equally.

F. PUBLIC RECORDS DISCLAIMER

MHDC is subject to Missouri Sunshine Law (RSMo Chapter 610) and is required to disclose public records. Upon conclusion of the RFQ process and selection of one or more Respondent(s) in connection with this RFQ, all Proposals shall become public record and may be published or otherwise distributed to any individual or entity. No Proposal or associated documentation will be returned to the Respondent(s).

G. ADVERTISING AND PUBLICITY

Respondents may not issue any news release or otherwise seek publicity regarding this RFQ. No Respondent shall use the name or logo of MHDC or any adaptation, extension, or abbreviation of such name for advertising, trade display, or other commercial purposes except as specifically approved by MHDC in writing.

H. COSTS AND LIABILITY

This RFQ does not commit or obligate MHDC to enter into any negotiations, contractual agreement, or Final Contract with any Respondent. Each Respondent will be responsible for costs incurred in preparation of its Proposal. MHDC reserves the right to accept or reject any or all Proposals or offers made in response to this RFQ.

I. RIGHTS OF MHDC

MHDC reserves and may exercise one or more of the following rights and options regarding this RFQ:

1. Reject any and all Proposals;
2. Seek additional Proposals;
3. Seek clarification or additional information in connection with any Proposal;

4. Select one or more Respondents;
5. Enter into negotiations with any Respondent;
6. Enter into a Final Contract with the successful Respondent, or enter into multiple Final Contracts with multiple Respondents;
7. Choose not to award any contract under this RFQ;
8. Add to, delete, modify, reduce, or enlarge this RFQ including any specifications and/or the Scope of Work, or terms or conditions;
9. Modify the terms and conditions of any proposed or executed contract awarded pursuant to this RFQ;
10. Cancel or withdraw this RFQ without the substitution of another RFQ, or alter the terms and conditions of this RFQ;
11. Conduct credit checks and investigations as to the qualifications of each Respondent at any time prior to the award of a contract; and/or,
12. Extend deadlines or otherwise modify the required schedule in its sole discretion.

J. RFQ REVISIONS

In the event MHDC deems it necessary or appropriate to revise or clarify the terms or provisions of this RFQ, any such revisions or clarifications will be issued in the form of an addendum. Any such addendum issued by MHDC will also be posted to our web site at <https://mhdc.com/>.

K. EXPENSES RELATED TO PROPOSALS

MHDC is not responsible for any expenses incurred in preparing and submitting a Proposal or taking any action in connection with the selection process, or for the costs of any services performed in connection with submission of a Proposal.

L. RESERVATION OF RIGHTS

The Commission reserves the right to conduct any investigation of the qualifications of any firm that it deems appropriate; negotiate modifications to any of the items proposed in the Proposal; request additional information from any firm; reject any or all Proposals; and waive any irregularities in any Proposal.

The engagement described in this RFQ is not exclusive and MHDC expressly retains the right at any time to retain any other firm or firms to provide other appraisal services without violating the engagement contemplated by this RFQ.

M. VISITS AND INTERVIEWS

All firms responding to this RFQ may be required to schedule a visit to the MHDC offices or to another location upon request by the Commission. In addition, firms responding to this RFQ may be interviewed by MHDC staff as a part of the selection process.

N. INDEPENDENT AND UNBIASED RESEARCH

All research and work performed hereunder must be done in an independent and unbiased manner.

Entities or parties having business, personal, or social ties to affordable housing will not be precluded from submitting a Proposal in response to this RFQ, but all Proposals must be unbiased toward any special interest group, housing variable category, or population demographic. Any connection to a specific group must be disclosed in the Proposal.

O. OTHER LEGAL CONDITIONS

By virtue of its signed Proposal to this RFQ, the Respondent agrees that, in the event it is selected to provide the goods and services pursuant to this RFQ, it will enter into good faith negotiations in pursuit of an acceptable Final Contract. MHDC, at its sole discretion, may incorporate any and all terms and conditions included in this RFQ, the Proposal, and any additional provisions required by MHDC into the Final Contract. Any Respondent selected to proceed toward a contract with MHDC will be required to include in the Final Contract provisions that address issues of liability, indemnification, insurance, payment terms, and such other terms and conditions as are customary for agreements that address the subject matter of this RFQ.

Each Respondent must conspicuously state in its Proposal its inability or unwillingness to accept any of the provisions, terms or conditions in this RFQ, including any provisions set forth in exhibits, and must include in its Proposal the reason(s) for any such exceptions. The Final Contract shall become effective on the date it is fully executed by MHDC and the successful Respondent(s). The Final Contract and any extensions or modifications thereof shall remain in full force and effect until completion of the Scope of Work and approval of the same by MHDC unless otherwise extended or terminated pursuant to the terms of the Final Contract.

MHDC and Respondent may, at any time after a selection is made under this RFQ and before the Scope of Work is completed, agree to extend or expand the Scope of Work to include additional services or goods, and/or to provide additional time to complete the Scope of Work, provided that all such amendments to the Final Contract must be agreed to in writing by both MHDC and Respondent.

III. PROCEDURES AND INSTRUCTIONS

A. SUBMISSION OF PROPOSAL:

Each Respondent must submit one electronic copy of its Proposal via email by the Response Due Date of May 26, 2026. Electronic email copies must be submitted to:

Denise Greenbaum
Information Services Administrator
dgreenbaum@mhdc.com
Subject line: "2026 Multifamily Software Proposal to MHDC"

The email submission must contain the name of the firm submitting the Proposal and the contact information of the submitter.

MHDC is not responsible for failure of timely electronic delivery for any reason including reasons due to interruption of service. Proposals must be received by MHDC by the deadline. *Proposals must be*

submitted as outlined herein.

B. PROPOSAL DUE DATE

Each Proposal must be received by MHDC no later than May 26, 2026, 5:00 PM Central Time. Proposals received after 5:00 PM Central Time on May 26, 2026, will be deemed ineligible and will not be accepted.

No Respondent may modify or correct its Proposal at any time after the Proposal Due Date, except in direct response to a request from MHDC.

C. SUBMISSION QUESTIONS

Questions regarding this RFQ should be submitted in writing via email before May 14, 2026, to:

Denise Greenbaum
Information Services Administrator
dgreenbaum@mhdc.com
Subject line: "2026 Multifamily Software RFQ Question"

Notice Regarding Distribution of Questions and Answers

To promote transparency and fairness, and in an effort to prevent any real or perceived unfair advantage, no verbal questions will be answered. *All questions and inquiries must be in writing.* All questions or requests for additional information submitted to MHDC regarding this RFQ and the corresponding answers will be published on MHDC's website or otherwise made available to all Respondents.

IV. STRUCTURE OF PROPOSAL

1. Each Proposal shall include a transmittal letter signed by an authorized representative of the firm. In the transmittal letter the Respondent shall certify (i) that no elected or appointed official or employee of the Commission is financially interested, directly or indirectly, in the performance of the services specified in the RFQ, (ii) that the information included in the Proposal is true and correct to the best of its knowledge, and (iii) that the person signing the transmittal letter is authorized to execute the Proposal on behalf of the firm.
2. Proposals should be organized in the same manner as the individual information request contained in Section VI: Proposal Details. Responses to each numbered question shall begin on a separate page (e.g., answers to Question 2 should begin on a separate page from the response to Question 1).
3. MHDC desires to consider Proposals in a consistent and easily comparable format as established in this RFQ. Proposals not organized as set forth in this RFQ may, at MHDC's discretion, be considered unresponsive. Do not refer to other parts of your Proposal in lieu of answering a specific question. Do not provide references to filings or forms publicly available, including on the firm's website or in publicly available sources, in lieu of providing specific information in the Proposal.
4. Exhibits containing additional information may be attached to provide a more detailed response to a question, but only if clearly identifiable as a response to a specific question.

V. MINIMUM QUALIFICATIONS OF RESPONDENT

The Respondent must have substantial depth, knowledge, and experience with state and federal government housing programs including the Low-Income Housing Tax Credit, HOME Program, National Housing Trust Fund, and Section 8.

VI. PROPOSAL DETAILS

Respondents responding to this RFQ should prepare clear and complete responses to each of the following questions and information requests. Brevity and clarity of responses will be appreciated.

1. Profile of the Firm. Describe your firm and its areas of expertise. Provide documentation on the firm's business entity including legal structure, state of organization, organizational documents, federal employer identification number, and evidence of Respondent's good standing with the state. State whether your entity is local, regional, or national. Give the location of the office from which the work is to be performed, and the number of partners, managers, supervisors, and other professional staff employed at that office, and status as a veteran-owned business. Describe how your firm meets the minimum qualifications listed in Section V.
2. Qualifications and Experience. Describe in detail your ability to meet all requirements and expectations set forth in the Scope of Work listed in Section II(B). Include answers to all questions asked in the Scope of Services. Also include your relevant work with other housing finance agencies and government organizations.
3. Ownership Details. Pursuant to the Standards of Conduct, any Response under this RFQ shall disclose the name of the individual, entity, and/or entities having ownership interests in the Respondent. All entities identified in this disclosure shall be reduced to their human being level irrespective of the number of entity layers which may be present for any disclosed entity. Notwithstanding the previous sentence, to the extent any Respondent under this RFQ is a publicly traded corporation, such a Respondent may limit this disclosure to all board members, officers (and other key employees) and any shareholders owning or controlling ten percent (10%) or more of the corporation. Questions regarding this requirement or any other requirements or restrictions imposed by the Standards of Conduct may be directed to the Commission's General Counsel, Anne Powell, by phone at 314-877-1373 or email at apowell@mhdc.com.
4. Contact Person and Staffing. Provide the name, address, phone number, fax number and email address of the primary contact person of the Respondent. Identify the key personnel to be assigned MHDC's engagement, including supervisory personnel. Resumes for each supervisory person to be assigned to the appraisal should be included, and specific experience should be indicated. The resumes may be included as an appendix. Describe your policy regarding notification of changes in key engagement personnel and expectations regarding staff continuity.
5. Litigation, Investigations, and Regulatory Proceedings. Describe any pending investigation, litigation, recent settlements, or regulatory sanctions in providing housing and funds management software systems and data migration in the last five (5) years. Give sufficient detail for evaluation.
6. References. Provide the names, contact person(s), and phone numbers for at least three client references.
7. Affiliations and Subcontractors. Respondent must identify and fully explain all third-party agreements, joint venture arrangements, and/or relationships that will result in the provision of any services in

whole or in part by outside parties, third-party contractors, affiliates, or subcontractors, including any Veteran, minority or women-owned firms. Respondent must provide documentation regarding the qualification and experience of all third-party agencies as a whole, as well as for each staff member proposed to be involved in performing the Scope of Work. In addition, Respondent must clearly delineate the duties and obligations being assumed by which parties in carrying out the Scope of Work. In identifying any such parties, Respondent must include each party's full legal name, state of organization (in the case of an entity), all contact information (e.g., address, phone/fax numbers, email address, primary point of contact, etc.). Joint ventures are required to designate a single contracting entity with the authority to negotiate, execute and bind the joint venture to any potential future contract and act as the party responsible to MHDC. The provisions of this paragraph do not require inclusion of information regarding use of a temporary employment on contract labor to provide day labor or temporary staffing except that the Respondent must include information about the employment entity that will provide such day labor or temporary staffing and must include information about whether the persons contracted or employed will be located within the state of Missouri.

8. Federal Work Authorization Program. Pursuant to *Mo. Rev. Stat. § 285.530.2*, any Respondent selected pursuant to this RFQ must provide MHDC with an affidavit stating that the institution does not employ any person who is an unauthorized alien in conjunction with the contracted services, and that the Respondent is enrolled and participates, or who will enroll and participate, in a federal work authorization program with respect to the employees working in connection with the contracted services. A requisite affidavit is attached hereto as Exhibit "B," an original of which must be signed, acknowledged, and submitted by each Respondent as part of its Proposal submitted under this RFQ. Prior to execution of any agreement contemplated herein, the Respondent selected under this RFQ will be required to provide evidence of participation in a federal work authorization program.

Additionally, in the event Respondent is utilizing any third-party to carry out a portion of the Scope of Work (whether via a sub-contract arrangement, joint venture agreement, or otherwise) then each third-party entity must also provide a comparable affidavit to MHDC, as well as proof of that entity's enrollment and participation in a federal work authorization program and these workforce requirements must be contained in any agreement between the Respondent and said third-party. The requirements contained in this section apply to any third-party employment agency or entity providing temporary employee labor. Questions regarding this requirement may be directed to MHDC's General Counsel, Anne Powell, by phone at 314-877-1373 or email at apowell@mhdc.com. *In your Proposal, please indicate whether your firm is currently enrolled and participating in a federal work authorization program such as E-Verify. If another entity is enrolled in a federal work authorization program such as E-Verify on behalf of Respondent, then Respondent must explain the relationship and submit the required documentation for the entity that is actually enrolled in the federal work authorization program.*

9. Authorization to Do Business in Missouri. Respondent should explain its authorization to do business in Missouri and include a copy of relevant public documents, such as a Missouri certificate of good standing, a foreign business registration, a fictitious name filing, or a copy of filed organizational documents. Likewise, Respondent must explain authorization to do business in Missouri and include like documents for all third-party agreements, joint venture arrangements, and/or relationships that will result in the provision of any services in whole or in part by outside parties, third-party contractors, affiliates, or subcontractors. In the event the Respondent or other entities included in the Response is not currently authorized to do business in Missouri, then include Respondent's proposed method and timeline for gaining authorization.

10. Economic Impact to Missouri. Respondent must provide information and data concerning the economic impact of any contract entered into pursuant to this RFQ. At minimum, the Respondent must provide:
 - a. A description of proposed services that will be performed and/or the proposed products that will be provided by Missourians;
 - b. A description of the economic impact returned to the state of Missouri through tax revenue obligations and otherwise; and
 - c. A description of the Respondent's economic presence within the state of Missouri, including Missouri employee statistics.
11. Prohibition to Boycott Israel. Pursuant to *Mo. Rev. Stat.* §34.600, MHDC shall not enter into a contract with any agency that boycotts Israel. In your proposal, state whether your agency is or is not currently engaged in a boycott of (i) goods or services from the State of Israel; (ii) companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or (iii) persons or entities doing business in the State of Israel. "Boycott" means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations, but does not include an action made for ordinary business purposes.

VII. EVALUATION CRITERIA

The qualifications of the Respondents submitting Proposals will be reviewed by MHDC staff and it is possible that several of the Respondents may be invited to make presentations.

The criteria used in evaluating the Responses will include, but are not limited to, the following (in no particular order of importance):

- ✓ Qualifications, capabilities, and expertise of the Respondent's staff;
- ✓ Response to the functional requirements;
- ✓ Relevant experience providing similar services to state housing agencies or other clients;
- ✓ Feedback obtained from references;
- ✓ Related investigations and/or disciplinary actions will be taken into account;
- ✓ MHDC's prior experiences, if any, with the Respondent and any other factors MHDC believes would be in its best interest to consider;
- ✓ The ease of administration;
- ✓ Total cost of implementation;
- ✓ Total cost of ownership (5 years); and,
- ✓ Organization's method of support.

There is no additional information requested. Thank you for reviewing this RFQ. We look forward to your response.

Exhibit A – Funding Types for Compliance (List complete as of 03.20.2026)

Funding	Funding Description	Annual Inspection Frequency
811	811 PRA	3
A	HOME-ARP	2
AHAP	AHAP Only	3
C	CHDO	2
DR	CDBG-DR	
F	Housing Trust Fund-State	2
GSB	Great Southern Bank	1
H	HOME	2
HC	HOME CHDO	2
HCT	HOME CHDO and Tax Credit	2
HCT/RS	HOME CHDO and Tax Credit and Risk Share	1
HCTE	HOME CHDO and Tax Exempt Bond	2
HCTE/RS	HOME CHDO and Tax Exempt Bond and Risk Share	1
HCTUSB	HOME CHDO and Tax Credit and US Bank	1
HCTZ	HOME CHDO and Tax Credit and Tax Credit Replacement	1
HMT	HOME and MHDC and Tax Credit	1
HNT	HOME and National Housing Trust Fund and Tax Credit	2
HT	HOME and Tax Credit	2
HT/PB	HOME and Tax Credit and Pulaski Bank	1
HT/Y	HOME and Tax Credit and Tax Credit Assistance Program	1
HT/Z	HOME and Tax Credit and Tax Credit Replacement	1
HT/Z/USB	HOME and Tax Credit and Tax Credit Replacement and US Bank	1
HTE	HOME and Tax Exempt Bond	2
HTE/RS	HOME and Tax Exempt Bond and Risk Share	1
HTE/X	HOME and Tax Exempt Bond and Conduit Pass Thru	2
HTE/Y	HOME and Tax Exempt Bond and Tax Credit Assistance Program	1
HTE/Z	HOME and Tax Exempt Bond and Tax Credit Replacement	1
HTE/Z/RS	HOME and Tax Exempt Bond and Tax Credit Replacement and Risk Share	1
HTE/Z/USB	HOME and Tax Exempt Bond and Tax Credit Replacement and US Bank	1
HTUSB	HOME and Tax Credit and US Bank	1
HTUSBY	HOME and Tax Credit and US Bank and Tax Credit Assistance Program	1
HTY	HOME and Tax Credit and Tax Credit Assistance Program	1
HUSB	HOME and US Bank	1
HZ	HOME and Tax Credit Replacement	1
M	MHDC Fund Balance & Note Sale Surplus Cash Loan	1
M/PL	MHDC Fund Balance and Participation Loan	1

MH	<u>M</u> HDC Fund Balance and HOME	1
MHC/TE/RS	<u>M</u> HDC Fund Balance with <u>H</u> OME CHDO & <u>T</u> ax Exempt Bond with Risk Share	1
MHCT	<u>M</u> HDC Fund Balance with <u>H</u> OME CHDO & <u>T</u> ax Credit	1
MHCT/RS	<u>M</u> HDC Fund Balance with <u>H</u> OME CHDO & <u>T</u> ax Credit with Risk Share	1
MHT	<u>M</u> HDC Fund Balance with MHDC <u>H</u> OME & <u>T</u> ax Credit	1
MHT/RS	<u>M</u> HDC Fund Balance with MHDC <u>H</u> OME & <u>T</u> ax Credit with Risk Share	1
MHTE	MHDC Fund Balance with MHDC HOME & Tax Exempt Bond	1
MHTE/RS	<u>M</u> HDC Fund Balance with MHDC <u>H</u> OME & <u>T</u> ax Exempt Bond with Risk Share	1
MHTE/RS/F	<u>M</u> HDC Fund Balance with MHDC <u>H</u> OME & <u>T</u> ax Exempt Bond with Risk Share and Trust Fund	1
MHTUSB	MHDC Fund Balance with Tax Credit & US Bank	1
MNHTE	MHDC Fund Balance with National Housing Trust Fund (NHTF) and MHDC HOME & Tax Exempt Bond	1
MNT	MHDC Fund Balance with National Housing Trust Fund (NHTF) and Tax Credit	1
MT	MHDC Fund Balance with Tax Credit	1
MT/PL	MHDC Fund Balance with Tax Credit AND Participation Loan	1
MT/RS	MHDC Fund Balance with Tax Credit and Risk Share	1
MTE	MHDC Fund Balance with Tax Exempt Bond	1
MTE/RS	MHDC Fund Balance with Tax Exempt Bond and Risk Share	1
MTGSB	MHDC Fund Balance with Tax Credit & Great Southern Bank	1
MTUSB	MHDC Fund Balance with Tax Credit & US Bank	1
MTY	MHDC Fund Balance with Tax Credit & Tax Credit Assistance Program	1
MTZ	MHDC Fund Balance with Tax Credit & Tax Credit Replacement	1
MY	MHDC Fund Balance & Tax Credit Assistance Program	1
N	National Housing Trust Fund (NHTF) follows same rules for frequency as HOME regs.	2
NT	National Housing Trust Fund and Tax Credit	2
PB	<u>P</u> ulaski <u>B</u> ank Participation Loan	1
PL	<u>P</u> articipation <u>L</u> oan <u>NOT</u> with USB or GSB	1
POST-MOR	HAP (No Regular Frequency)	Use Other Funding
PRE-MOR	HAP	1
RI	HUD <u>R</u> ural <u>I</u> nitiative Grant	2
RS	<u>R</u> isk <u>S</u> hare	1
SDA	<u>S</u> ub <u>D</u> ivision	
T	<u>T</u> ax Credit	3
T/AHAP	<u>T</u> ax Credit and AHAP	3
TE	Tax Exempt Bond	3

TE/RS	Tax Exempt/Risk Share	1
TE/X	<u>Tax Exempt</u> Bond/Conduit Pass Thru	3
TE/YZ/RS	Tax Exempt Bond and Tax Credit Assistance Program and Tax Credit Replacement and Risk Share	1
TEY	Tax Exempt Bond and Tax Credit Assistance Program	1
TEYZ	Tax Exempt Bond and Tax Credit Assistance Program and Tax Credit Replacement	1
TEZ	Tax Exempt Bond and Tax Credit Replacement	1
TEZ/RS	Tax Exempt Bond and Tax Credit Replacement and Risk Share	1
TY	Tax Credit and Tax Credit Assistance Program	1
TYZ	Tax Credit and Tax Credit Assistance Program and Tax Credit Replacement	1
TYZ/USB	Tax Credit and Tax Credit Assistance Program and Tax Credit Replacement and US Bank	1
TZ	Tax Credit and Tax Credit Replacement	1
USB	<u>US</u> Bank	1
Y	Tax Credit Assistance Program	1
YZ	Tax Credit Assistance Program and Tax Credit Replacement	1
Z	Tax Credit Replacement	1

Exhibit B

Workforce Eligibility Affidavit

The undersigned does, by his/her oath solemnly swear and affirm that he/she is the _____ of _____ and as such officer or agent of such entity I am duly authorized to make this affidavit on behalf of said entity. On behalf of such entity and pursuant to the authority recited herein, the undersigned does further solemnly swear and affirm and that said entity:

CHECK ONE:

1. *Choose one:*
- Is enrolled and actively using the E-Verify system **or**
- has entered an agreement with _____, and said entity is enrolled or actively using the E-Verify System **pursuant to the attached agreement;** and
2. Does not knowingly employ any person who is an unauthorized alien, and
3. Certifies that all its employees are lawfully present in the United States;

OR

1. Is not an employer and does not have any employees,
2. Certifies that for the duration of the contract with the Missouri Housing Development Commission, any independent contractor and subcontractors of such independent contractor paid for labor performed in connection with such contract are properly classified as independent contractors and should not be classified as employees,
3. Certifies that for the duration of the contract with the Missouri Housing Development Commission, any independent contractor and subcontractors of such independent contractor paid for labor performed in connection with such contract are not unauthorized aliens and are lawfully present in the United States,
4. Certifies that if, at any time, it does employ any employees, it will immediately enroll and begin actively using the E-Verify system and will not knowingly employ any person who is an unauthorized alien and that all such employees it does hire will be lawfully present in the United States.

The undersigned affirms, under penalty of perjury, that all statements made herein are true and correct.¹

¹ *Once fully executed and notarized, a scanned version of this document may be submitted electronically to MHDC via email. If submitted as such, the undersigned agrees that the signature is to be treated as an original signature and the document (in the form of a photocopy, PDF, or other electronic form) is to be treated as an original document with the same legal effect and enforceability as the original signed document. Regardless, MHDC in its sole and absolute discretion reserves the right to request an original signed hard copy of the document as it deems necessary. The undersigned is responsible for retaining an original signed hard copy in his/her files.*

ATTACH E-VERIFY Memorandum of Understanding, and third party agreement, if applicable.