



**REQUEST FOR PROPOSAL
RFP # 25P-FI-223**

INVESTMENT SERVICES

September 2025

Prepared By:

Cook Inlet Housing Authority
Procurement Department
3510 Spenard Road, Suite 100
Anchorage, Alaska 99503
(907) 793-3000

Contact:
Rashaad Esters, Procurement Manager
Email: resters@cookinlethousing.org
Phone (907) 793-3064

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

Table of Contents

REQUEST FOR PROPOSAL	4
PROPOSAL SUBMITTALS	4
QUESTIONS	4
CONTRACT TERM	4
CURRENT INVESTMENT SERVICES	4
CIHA BACKGROUND	5
SCOPE OF SERVICES	6
QUALIFICATIONS AND REQUIREMENTS	6
PREFERENCE STATEMENT	6
INDEMNITY AND INSURANCE REQUIREMENTS	7
GENERAL RFP CONDITIONS TO PROPOSERS	10
RFP PROVISIONS	10
PROPOSAL REQUIREMENTS AND REQUESTED INFORMATION	11
EVALUATION PROCESS	12
SCORING CRITERIA	13
PREFERENCE FACTOR	13
PROTEST	14
AWARD	14
LIST OF ATTACHMENTS	15

SPECIFIED DATES

Description	Date and Time	Location
1. Bid Packet Available	September 9, 2025	CIHA Website
2. Questions Due Date	September 16, 2025, 2:00 p.m.*	Email
3. Proposal Due Date	September 30, 2025, 2:00 p.m.*	Email/Mail/Hand Delivery

*All times stated in Alaska Time zone

** Estimated

CIHA Procurement Office is located at 3510 Spenard Road, Anchorage, AK 99503.

REQUEST FOR PROPOSAL

RFP # 25P-FI-223
Investment Services
September 2025

Cook Inlet Housing Authority (CIHA) is a state-chartered Housing Authority primarily funded by the Department of Housing and Urban Development, with other State and private grant fund sources. CIHA is accepting proposals from responsive and responsible investment companies or banks to provide the following products and services:

- Investment services; and
- Other services on an as needed basis.

PROPOSAL SUBMITTALS

Proposals must be submitted, clearly marked: **“Attn: Procurement, RFP# 25P-FI-XXX, Investment Services – Do Not Open”**. CIHA will reject proposals received after the deadline. Faxed proposals will not be accepted.

- **Mailed and hand-delivered proposals:** Proposals must be received at CIHA, Attention: Procurement, 3510 Spenard Road, Anchorage, Alaska 99503 no later than September XX, 2025, at 4:00 p.m., according to the time clock located at CIHA’s front desk.
- **Emailed proposals:** Proposals must be received no later than September XX, 2025, at 4:00 p.m., according to the time and date received by CIHA’s email server. Emailed proposals may be submitted to Procurement@cookinlethousing.org.

QUESTIONS

CIHA shall not be bound by any oral interpretation of this RFP. Questions are encouraged, and should be sent in writing to Rashaad Esters by email to procurement@cookinlethousing.org by the deadline in the Specified Dates.

No communication is to be directed to any other CIHA employees or CIHA representatives.

CONTRACT TERM

The awarded contract will be in effect for a period of two (2) years with an option to extend for three (3) additional one (1) year terms based on satisfactory performance, mutual consent and agreed upon pricing. The option extensions shall automatically renew for one (1) year unless either party gives written notice thirty (30) days prior to the expiration thereof. This contract will not necessarily result in an exclusive agreement to provide these services to CIHA. CIHA may select more than one firm to provide services under this RFP.

CURRENT INVESTMENT SERVICES

As of June 2025, CIHA and affiliates held approximately \$89 million in investments in mutual funds or certificates of deposit. The investments are currently held with Wells Fargo Securities, Wells Fargo Advisors, and Northrim Bank.

The investments consist of the following:

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

Mutual Fund	Ticker	June 2025 Market Value
Allspring Government Money Market Fund	WFFXX	\$65.4M
Vanguard Intermediate-Term Treasury Fund Admiral Shares	VFIJX	\$9.1M
Vanguard Total Stock Market Index Fund Admiral Shares	VTSEX	\$10.9M
Vanguard Total International Stock Index Fund Admiral Shares	VTIAX	\$3.5M
Certificates of Deposit / Cash Sweep		\$4.9M

The investments are currently held with Wells Fargo Securities, Wells Fargo Advisors, and Northrim Bank.

CIHA BACKGROUND

CIHA provides housing opportunities that empower our people and build our community. Our vision is to be a self-powered business that delivers quality, innovation, and equality to community through our housing and community development activities. While CIHA strives to provide quality affordable housing for low to moderate income families, the approach we take to fulfilling that goal results in a highly diversified business. CIHA acts as a residential and commercial property developer, manager, construction contractor, building maintenance provider, and lender. CIHA achieves its service delivery objectives through complex business strategies and today has approximately 45 subsidiaries and affiliates, the majority of which are Low Income Housing Tax Credit (LIHTC) partnerships.

CIHA is an Alaska Regional Housing Authority that receives funding through earned income; federal, state and private grants; loans proceeds; and investment income. CIHA receives and administers Indian Housing Block Grants (IHBG) and Indian Community Development Block Grant (ICDBG) funds awarded under the Native American Housing and Self-Determination Act (NAHASDA), and also secures funding from a variety of other sources that allows us to provide housing for a culturally diverse client base. CIHA's work often extends beyond the traditional boundaries of housing and community development, including research, public policy, and other functions that enhance our efficacy in achieving our primary mission.

Cook Inlet Housing Authority ("CIHA") develops, owns and operates affordable rental housing for seniors, families and individuals in south-central Alaska. CIHA also owns several commercial properties as part of our investment in neighborhood revitalization as well as for our own use. Our work varies from year to year as we endeavor to meet the needs of the communities we serve and to meet our mission: to create housing opportunities that empower our people and build our community.

CIHA and its affiliates including Cook Inlet Lending Center (CILC) currently employ approximately 220 people who work as a team to offer housing programs and manage rental housing located in Anchorage, Kenai, Seldovia and Ninilchik.

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

Additional information regarding CIHA and CILC can be found at www.cookinlethousing.org and www.cookinletlending.com.

SCOPE OF SERVICES

The following is an outline describing the Scope of Services required:

1. Custodial Services

Safekeeping of assets, account statements, trade confirmations, and reporting.

2. Investment Management

On a non-discretionary basis, manage or facilitate investment in an array of investments including but not limited to CDs, market mutual funds and money market funds in compliance CIHA's Investment Policy Statements.

3. Cash Management

Provide for cash sweep program to manage otherwise uninvested cash, offering competitive yields on money market funds.

4. Advisory Services

As requested, provide capital market projections and recommendations for investment policies to better align the portfolio with objectives, risk tolerance, and regulatory constraints.

5. Other Services Offered

If the proposer has any other alternative or supplemental services that could enhance value or be of interest to CIHA, please describe as part of the response to this RFP. The costs of such services should also be stated.

QUALIFICATIONS AND REQUIREMENTS

Proposer is to have adequate resources of qualified personnel and equipment to comply with responsiveness requirements as stated.

- A registered investment advisor under the Investment Advisers Act of 1940, as amended, or be a bank as defined in that Act.
- Have Assets Under Management (AUM) of \$200 million or more.
- Must indicate ability to execute HUD Depository Agreement as written.

If required, contractor shall provide current certificate of insurance and business license as defined by this RFP.

Contractor shall not be suspended, debarred, or determined to be ineligible by HUD in accordance with HUD regulations or by other Federal agencies.

PREFERENCE STATEMENT

Small-, Minority- and Women-owned preference in contracting is applicable to this Request for Proposal and any contractor/firm/vendor stating a preference must submit a signed HUD 5369-C Certification Form (Attachment 004546) with their submitted bid to qualify for a preference; ownership must be a minimum of 51% and be active in the day-to-day control and operation of the business. CILC shall reserve ten percent (10%) of the total of available rating points for qualified Alaska Native/American Indian-owned organizations or economic enterprises and five percent (5%) for Small-, Minority- and Women-owned.

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

The prospective contractor must provide, to the greatest extent feasible, preference in employment and training opportunities created as a result of a contract awarded as a result of the RFP.

INDEMNITY AND INSURANCE REQUIREMENTS

Indemnification

To the fullest extent permitted by law, Contractor shall release, defend, indemnify and hold Cook Inlet Housing Authority (CIHA), its subsidiaries, directors, officers, agents, officials, employees and consultants (collectively, "Indemnified Parties") harmless from and against all claims or loss, including without limitation any and all demands, suits, expenses, damages, fines, charges, liens, actions or liability of any nature, kind or character whatsoever, and including without limitation, claims or loss resulting from injury, death, economic loss, violation of statutes, ordinances, constitutions or other laws, rules or regulations, contractual claims, attorneys' fees, costs or expenses or any other kind of loss (collectively, "claims or loss"), related to, resulting from or arising directly or indirectly out of the activities of Contractor, the performance, failure of performance or breach of any term of this Contract by Contractor, or by any person or entity employed by Contractor in the performance of this Contract, regardless of whether such claim or loss is caused in part by Indemnified Parties.

Contractor's responsibility for defense and indemnification extends to and includes any claim or loss alleging acts or omissions by Indemnified Parties that are said to have contributed to the claim or loss. However, Contractor shall not be required to indemnify an Indemnified Party for any claim or loss that results from the sole negligence or willful misconduct of the Indemnified Party.

In any and all claims against the Indemnified Parties by any employee of Contractor, anyone directly employed by Contractor or anyone for whose acts the Contractor may be liable, the indemnification obligation shall not be limited in any way by any limitation on the amount or type of damages, compensation or benefits payable by or for Contractor under workers' compensation acts, disability benefit acts or other employee benefit acts. Contractor agrees that as part of any subcontract, its subcontractor shall provide assurance of defense and indemnity in CIHA's favor that are identical in scope as those assumed by Contractor under the terms of this Contract.

The requirement of any insurance required of Contractor under this Contract shall not limit Contractor's indemnification responsibilities under this section in any way.

Insurance

Without limiting the Contractor's indemnification responsibilities, it is agreed that Contractor shall purchase, at its own expense, and maintain in force at all times during the performance of services under this agreement the following policies of insurance. Such policies shall be primary and noncontributory to any policies held by CIHA.

Where specific limits are shown, it is understood that they shall be the minimum acceptable limits. If the Contractor's policy contains higher limits, CIHA shall be entitled to coverage to the extent of such higher limits. Certificates of Insurance must be furnished to the Manager of Procurement prior to fully executing the Contract, and as a condition of payment, Contractor shall purchase and maintain insurance that will protect it from the claims arising out of its operations under the Contract, whether the operations are by Contractor, or any of its consultants or subcontractors or anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them

INVESTMENT SERVICES COOK INLET HOUSING AUTHORITY

may be liable. This includes Worker's Compensation Insurance, Employer's Liability Insurance, Comprehensive General Liability Insurance and Automobile Liability Insurance.

Contractor's insurance shall name Cook Inlet Housing Authority (CIHA) as additional insured, except for Worker's Compensation. All insurance policies shall comply with and be issued by insurers licensed to transact the business of insurance under Alaska Statutes Title 21. Failure to furnish satisfactory evidence of insurance or lapse of the policy is a material breach of this Contract and shall be grounds for termination of the Contractor's services. All insurance companies obligated under the following described policies must have a best rating of "A - VII" or better as identified in the A.M. Best Insurance Rating Guide, most recent edition.

Minimum Limits of Liability

Contractor shall maintain with a company satisfactory to CIHA at least the limits of liability set forth below. The requirements of this section shall not limit Contractor's indemnification responsibilities as provided in the Contract.

- a. Worker's Compensation and Employers' Liability: The Contractor shall provide and maintain, for all employees engaged in work under this Contract, coverage as required by AS 23.30.045; and, where applicable, any other statutory obligations including but not limited to Federal U.S.L. & H. and Jones Act requirements. This policy must waive subrogation against Cook Inlet Housing Authority.
 - i. Workers Compensation - Statutory limits
 - ii. Employers Liability - \$1,000,000 Each Accident, \$1,000,000 Disease - Each Employee; \$1,000,000 Disease - Policy Limits
- b. Commercial General Liability Insurance: Covering all business premises used by and operations conducted by the Contractor in the performance of services under this Contract with minimum coverage limits of \$1,000,000 combined single limit per occurrence. This policy must waive subrogation against Cook Inlet Housing Authority.
 - i. \$1,000,000 Each Occurrence
 - ii. \$2,000,000 General Aggregate
 - iii. \$2,000,000 Products/Completed Operations Aggregate
 - iv. \$1,000,000 Personal and Advertising Injury
 - v. \$50,000 Fire Damage Legal Liability (any one fire)
 - vi. \$5,000 Medical Expense (any one person)
- c. Professional Liability Insurance: Covering all errors, omissions or negligent acts in the performance of services under this Contract. Limits required per the following schedule:

<u>Contract Amount</u>	<u>Minimum Required Limits</u>
Under \$100,000	\$250,000 per Occurrence/Annual Aggregate
\$100,000 - \$499,999	\$500,000 per Occurrence/Annual Aggregate
\$500,000 - \$999,999	\$1,000,000 per Occurrence/Annual Aggregate
\$1,000,000 or over	Refer to Manager of Procurement

CANCELLATION, RENEWAL AND MODIFICATION

Contractor shall maintain in effect all insurance coverages required under the Contract at Contractor's sole expense and with insurance companies acceptable to CIHA. All policies shall

INVESTMENT SERVICES COOK INLET HOUSING AUTHORITY

contain a provision that coverage will not be modified, cancelled or not renewed until at least thirty (30) days prior written notice has been given to CIHA. Certificates of insurance showing required coverage to be in force pursuant to this Section shall be filed with CIHA prior to commencement of the Work. In the event Contractor fails to obtain or maintain insurance coverage required under the Contract, CIHA may purchase such coverage as desired for CIHA's benefit and charge the expense to Contractor or terminate the Contract for default.

CONTINUATION OF COVERAGE

If any of the required liability insurance is on a claims made basis, "tail" coverage will be required at the completion of this contract for twelve (12) months, or the maximum time period reasonably available in the marketplace. Contractor shall furnish certification of "tail" coverage as described or continuous "claims made" liability coverage for twelve (12) months following Contract completion. Continuous "claims made" coverage will be acceptable in lieu of "tail" coverage provided its retroactive date is on or before the effective date of this Contract. If Continuous "claims made" coverage is used, Contractor shall be required to keep the coverage in effect for not less than twelve (12) months from the end of the Contract. This will be a condition of the final acceptance of work or services.

CERTIFICATES OF INSURANCE

Certificates of insurance and copies of all insurance policies and endorsements if requested by **CIHA** required by this Section 10 shall be delivered to the **Procurement Manager** prior to commencement of the Work, or as soon thereafter, as is practicable. Renewable certificates shall be delivered to the **Procurement Manager** no later than thirty (30) days subsequent to the certificate's expiration date. No contract will be signed until the certificate of insurance has been received and approved by the Procurement Manager.

If the insurance expires or is cancelled during the term of the contract, services and related payments will be suspended. Certificates shall be addressed to Cook Inlet Housing Authority, ATTN: Procurement, 3510 Spenard Road, Anchorage, AK 99503.

ADDITIONAL INSURED

The Additional Insured Endorsement shall include the following: Cook Inlet Housing Authority, ATTN: Procurement, 3510 Spenard Road, Anchorage, Alaska 99503

EQUAL EMPLOYMENT OPPORTUNITY

The Contractor may not discriminate against any employee or applicant for employment because of race, religion, color, national origin, age, physical handicap, sex, marital status, changes in marital status, pregnancy, or parenthood. The Contractor shall post in conspicuous places, accessible to employees and applicants for employment, at the location of the project, notices setting out the provisions of AS 18.80.220.

The Contractor shall state, in all solicitations or advertisements for employees to work on this project, that the Contractor is an equal opportunity employer (EEO) and that all qualified applicants will be considered for employment without regard to race, religion, color, national origin, age, physical handicap, sex, marital status, changes in marital status, pregnancy, or parenthood.

The Contractor shall include the provisions of this EEO article in every subcontract relating to this Contract and shall require the inclusion of these provisions in every agreement entered into by any

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

of its subcontractors, so that those provisions will be binding upon each subcontractor.

GENERAL RFP CONDITIONS TO PROPOSERS

The general rules and conditions which follow apply to all proposals issued by CIHA unless otherwise specified.

REQUEST FOR PROPOSAL (RFP): is defined as a request for an offer, by one party to another, of terms and conditions with reference to some work or undertaking.

This document constitutes a RFP, and is thus a solicitation for responses. Conversely, this RFP is NOT a bid. Moreover, any acceptance of a proposal shall NOT result in a binding contract between CIHA and the proposer, but instead will simply enable negotiations to take place which may eventually result in a detailed and refined agreement or contract between the proposer and CIHA.

Completeness/Authorization of Proposal: Proposer shall supply all information and submittals required by the proposal documents to constitute a proper proposal. The proposal shall clearly state the legal name, address, telephone number, and fax number of the proposer. The proposal shall be signed above the typed or printed name and title of the signer. The signer shall have the legal authority to bind the proposer to the proposal.

Corrections to Submitted Proposals. Any changes that are made to this proposal using correction fluid, writing utensils, etc. before submission must be dated and initialed in each area that a change was made.

Collusive Proposing: The Proposer certifies that the proposal is made without any previous understanding, agreement or connection with any person, firm, or corporation making a proposal for the same project, without prior knowledge of competitive prices, and that the proposal is in all respects fair, without outside control, collusion, fraud or otherwise illegal action.

Subletting of Contract: Proposer shall not assign, transfer, convey, sublet or otherwise dispose of the contract or their right, title or interest therein, or their power to execute such contract to any other person, firm or corporation without the prior written consent of CIHA, but in no case shall such consent relieve the Proposer from their obligations, or change the terms of the contract.

RFP PROVISIONS

- If any proposer is in doubt as to the intent or meaning of any part of this Request for Proposal, or should CIHA omit anything from this RFP which is necessary to a clear understanding of the work, or should it appear that various instructions are in conflict, the proposer should contact the CIHA Procurement representative listed on the cover page of this document by the deadline for questions.
- Proposers are expected to fully inform themselves as to the conditions, requirements, and specifications before submitting a proposal. The submission of a proposal by a vendor implies vendor acceptance of the terms and conditions herein, unless otherwise stated.
- The format of the vendor's proposal must be consistent with the format of the specifications listed.
- All participating Vendors, by their proposal submission, shall agree to comply with all of the conditions, requirements and instructions of this RFP as stated or implied herein.

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

- Proposers shall respond with sufficient detail to facilitate the evaluation of all factors included in the Evaluation Criteria. Failure to provide required items will result in the proposal being considered non-responsive. Failure to provide sufficient information for the evaluation criteria will result in loss of points.
- The proposer is responsible for all costs related to the preparation of this Proposal.

PROPOSAL REQUIREMENTS AND REQUESTED INFORMATION

Proposals should demonstrate the qualifications, experience, and capacity of the Bank to provide CIHA with the banking services requested in this RFP. In providing the following information, restate each item and sub-item with its letter and number. Responses to each item must be included immediately after the restated item without reference to any appendix or attachment.

The following items must be included:

1) Mandatory Requirements. The following requirements must be met for a proposal to be further evaluated:

- a) Must be a registered investment adviser under the Investment Advisers Act of 1940, as amended, or be a bank as defined in that Act.
- b) Must have Assets Under Management (AUM) of at least \$200 million.
- c) Must indicate ability to execute HUD Depository Agreement as written.
- d) Must maintain reasonable internal controls to safeguard funds, accounts, and confidential data.
- e) Must employ appropriate disaster recovery plans and resources to adequately and completely protect all CIHA accounts.
- f) Must maintain records of all CIHA transactions for a period of no less than seven (7) years.

2) Firm and Personnel Qualifications and Experience

- a) Provide firm name, address, website and contact person name and information for the proposal.
- b) Provide firm background and attributes of the firm including investment philosophy, and Assets Under Management.
- c) Describe any unique characteristics of your organization relevant to the requested services.
- d) Provide background and qualifications of specific personnel who would be assigned to the CIHA account.
- e) Confirm compliance with SEC regulations and fiduciary standards, including any past regulatory issues.

3) Service Level and Products.

- a) Discuss the Scope of Services providing details about the methods and resources you will use and how you will accomplish each of the tasks involved.
- b) Identify fund families and specific funds which would be available to CIHA that is in conformance with CIHA's Investment Policy Statements. For money market funds identify current yield. Specify whether CIHA's existing mutual fund portfolio could continue with your firm. Specify whether mutual fund trades would settle T+1.
- c) Describe the capabilities of your technology platform, including online access, any access to mutual fund screeners, performance analytics, and market research.
- d) Submit sample portfolio reports and performance metrics.
- e) Specify whether money market and mutual fund trades can be done online by CIHA or if they must be coordinated through a firm representative.
- f) Describe how safeguarding of assets will be ensured.

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

- g) Discuss periodic consultation, training and other resources, if any, that would be offered to CIHA management and/or its Board of Commissioners.
- h) If the firm is unable to provide any of the requested services, specifically identify any exceptions.
- i) Describe the firm's ability to offer products and service enhancements.
- j) Describe how your firm would coordinate a smooth transition from CIHA's current investment manager(s).

4) Fee Proposal

- a) Provide a detailed fee schedule including custodial, transaction and advisory fees, plus expense ratios for proposed funds.
- b) If applicable, delineate any service levels and associated cost.

5) Addendum/acknowledgement.

6) Completed form HUD-5369-C

7) Completed Lobbying Certification and Disclosure

EVALUATION PROCESS

Proposals received in response to this RFP will be reviewed by an evaluation committee. The committee may, at its discretion, decide to interview the proposers. The oral presentation may be considered in the evaluation of the proposal, and overall scores under Proposer Information may be adjusted at the discretion of the evaluation committee.

- An evaluation committee will independently evaluate the merit of proposals received in accordance with the evaluation factors defined in the RFP. Failure of the bidder to provide any information requested in the RFP may result in disqualification of the proposal and shall be the responsibility of the proposer. The evaluation process shall be based on a 100 point scale. The proposal that accrues the highest point total shall be recommended for award subject to the best interests of CIHA. Categories have been identified for the evaluation process. Each category shall receive a point value within the specified range based on how well the proposal meets or exceeds CIHA's requirements. The following table lists the maximum points associated with each category.
- Each proposal submitted stands alone and will be evaluated on its own merits in terms of meeting CIHA's requirements and terms and conditions, pricing, and overall responsiveness to the Request for Proposal.
- Contractor submission of a proposal implies contractor acceptance of the evaluation technique and contractor recognition that some subjective judgments shall be made by CIHA during assignment of points.
- All contractors who submitted a proposal will be notified in writing of the results after the scoring and subsequent due diligence is completed.
- Any award as a result of this proposal shall be contingent upon the execution of an appropriate contract. This RFP and its attachments shall form the basis of the Contract Terms and Conditions. **Exceptions or deviations to this proposal must not be added to the proposal pages, but must be on vendor's letterhead and accompany the proposal.** Any exceptions to the Terms and Conditions will be taken into consideration

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

when evaluating proposals submitted. CIHA reserves the right to reject any or all of your proposed modifications.

SCORING CRITERIA

1)	Firm and Personnel Qualifications and Experience Provide a statement as to the proposer's qualifications to perform the services requested in this RFP. Maximum points shall be 10 .	10
2)	Service Level and Products Provide a statement as to the proposer's ability to perform the services requested in this RFP. Maximum points shall be 50 .	45
3)	Client References Provide a minimum of three (3) client references. Maximum Points shall be 10 .	10
4)	Fee Proposal Indicate specifically what is included in the proposed fee, plus any additional fee-for-service items if applicable Maximum Points shall be 20 .	20
5)	Alaska Native/American Indian owned contractor preference (if applicable must submit HUD 5369-C). 15pts OR Small/Minority/Woman-Owned (if applicable, must submit HUD 5369-C) 5pts Maximum Points shall be 15 .	5 Or 15

Total Possible Points ----- 100

PREFERENCE FACTOR

Alaska Native, American Indian and Minority preference in contracting is applicable to this Request for Quote and any contractor/firm/vendor stating a preference must submit a signed HUD 5369-C Certification Form (Attachment Number 004546) with their submitted bid to qualify for a preference; ownership must be a minimum of 51% and be active in the day-to-day control and operation of the business. CIHA shall reserve ten percent (10%) of the total of available

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

rating points for qualified Alaska Native/American Indian-owned organizations or economic enterprises and five percent (5%) for Small-, Minority- and Women-owned.

The prospective contractor must provide, to the greatest extent feasible, preference in employment and training opportunities created as a result of this Request for Proposal.

PROTEST

A protest may be submitted according to the procedures set forth below. A Bidder who wishes to appeal a Notice of Intent to Award must file a written protest within five (5) calendar days following the date this notice is issued. If the fifth day falls on a weekend or holiday, the last day of the protest period is the first working day following the fifth day.

The protest shall be filed with in writing and include the following information:

1. the name, address, and telephone number of the protester;
2. the signature of the protester or the protester's designated representative;
3. identification of the solicitation, contract, or grant agreement at issue;
4. a detailed statement of the legal and factual grounds of the protest, including copies of relevant documents; and
5. the form of relief requested.

Protest must be mailed or hand-delivered to:

Cook Inlet Housing Authority
Attn: Rashaad Esters, Procurement Manager
3510 Spenard Road, Suite 100
Anchorage, Alaska 99503

AWARD

Multiple Award: CIHA reserves the right to issue multiple awards as a result of the solicitation. CIHA reserves the right to award the contract locally and/or nationally in the aggregate, by section, multiple award, primary, secondary, and tertiary, whichever is in the best interest of CIHA.

Rejection of Proposals: CIHA reserves the right to accept or reject any or all proposals, to waive irregularities and technicalities. CIHA also reserves the right to reject the proposal of any proposer who has previously failed to perform properly or complete on time contracts of a similar nature, or a proposal from a proposer who, investigation shows, is not in a position to satisfactorily and timely perform the contract.

Selection: CIHA desires to enter into negotiations and ultimately reach an agreement with a Proposer, or Proposers, who demonstrate the best combination of attributes to conduct the service, and who also negotiate a service cost with CIHA that is fair and reasonable. CIHA may conduct discussions with any proposer who has submitted a proposal to determine qualifications, for further consideration. Since the initial review by CIHA will be deemed preliminary in nature, the document and process will be deemed confidential until such time as the successful proposer is selected. CIHA is not required to accept the proposal with the lowest cost estimate.

No proposal shall be withdrawn for a period of ninety (90) days subsequent to the deadline date for receipt of the proposals without the written consent of CIHA. In no way does this request for proposal constitute a contract, or obligate CIHA in any way

**INVESTMENT SERVICES
COOK INLET HOUSING AUTHORITY**

A firm, fixed-price contract for the work will be awarded in accordance with CIHA's procurement policies to the Contractor(s) that submit the highest rated proposal which will be graded on the scoring criteria. The awarded Contractor(s) will be required to provide the following:

- State of Alaska Business License
- Certificate of insurance as defined by this RFP
- IRS Form W-9

LIST OF ATTACHMENTS

- A. Certifications & Representations of Proposers, form HUD-5369-C
- B. Lobbying Certification and Disclosure
- C. Sample Form of Contract