



**Louisiana Housing Corporation**  
2415 Quail Drive, Baton Rouge, Louisiana 70808  
Phone: (225) 763-8700 Fax: (225) 763-8738

# REQUEST FOR PROPOSALS FOR FINANCIAL ADVISORS

## Addendum No. 2

Published May 25, 2017

*Date RFP Issued: Wednesday, May 11, 2017*  
*Deadline to Submit Proposals: June 19, 2017*

To All Proposers:

This addendum is issued to clarify, add, delete, correct and/or change the proposal documents to the extent indicated herein and is hereby made a part of the above-noted RFP documents on which the contract will be based. Any modifications/changes made by this addendum affect only the portions or paragraphs specifically identified herein; all remaining portions of the proposal are to remain in force. It is the responsibility to conform to this addendum.

1. *The Cover Page (page 1) has been revised to reflect a change to the date of the Deadline to Submit Proposals, and shall now read as follows:*

**Deadline to Submit Proposals: Monday, June 19, 2017 by 4:00 p.m. Central Time**

2. *Section I(D) – “General and Administrative - Important Dates and Deadlines”(page 3) has been revised to reflect a change in the date of the deadline for submitting proposals and the formal announcement of selected proposer, and shall now read as follows:*

<b>RFP published and posted to LHC website</b>	5/11/2017
<b>Deadline for submitting written inquiries</b>	5/31/2017 4:30p.m. Central Time
<b>Deadline for LHC to respond to written inquiries from proposers</b>	6/5/2017 4:30p.m.
<b>Deadline for submitting proposals</b>	6/19/2017 by 4:00 p.m. Central Time
<b>Oral Presentations (if necessary)</b>	07/12/2017
<b>Formal announcement of selected proposer</b>	07/12/2017
<b>Contract Execution</b>	TBD

3. *Section II(A) – “Submission Deadline and Method of Delivery” – Submission Deadline and Method of Delivery (page 5) has been revised to reflect a change in the date of the deadline for submitting proposals, and shall now read as follows:*

Proposals must be delivered in hard copy (printed) to the RFP Coordinator designated in Section I(B), above, **by no later than 4:00 p.m. Central Time June 19, 2017.** Proposers mailing their proposals should allow sufficient mail delivery time to ensure receipt of their proposal by the date/time specified above. **Fax or e-mail submissions are not acceptable and will not be considered.**

Proposals may be mailed through the U. S. Postal Service or delivered by hand or courier to:

**Louisiana Housing Corporation**  
2415 Quail Drive  
Baton Rouge, LA 70808  
(225)763-8700  
**Attn: Brenda Evans**  
**Re: Proposal RFP for Financial Advisor**

*The outside of the envelope, box or package must be CLEARLY MARKED with the following information and format:*

<b>Proposal Name:</b>	<b>Proposal for Financial Advisor</b>
<b>Proposal Submission Deadline:</b>	<b>06/19/2017</b>

Proposer is solely responsible for ensuring that its courier makes inside deliveries at the physical location. Proposer is solely responsible for the timely delivery of its proposals. Failure to meet the proposal submission deadline shall result in rejection of the proposal.

4. *A new heading will be added on page 14 and 15 Under “Section IV. Evaluation and Qualification Criteria and Selection Process” in section “D. Evaluation/Qualification Criteria”. The heading will be titled “5. Veteran-Owned and Service-Connected Disabled Veteran-Owned Small Entrepreneurships (Veteran Initiative) and Louisiana Initiative for Small Entrepreneurships (Hudson Initiative) Programs Participation” and shall read as follows:*

5. Veteran-Owned and Service-Connected Disabled Veteran-Owned Small Entrepreneurships (Louisiana Veterans Initiative Program or “LaVet” Program) and Louisiana Initiative for Small Entrepreneurships (Hudson Initiative) Programs Participation.

Ten percent (10%) of the total evaluation points on this RFP shall be reserved for proposers who are themselves a certified Veteran or Hudson Initiative small entrepreneurship. Reserved points shall be added to the applicable proposers’ evaluation score as follows:

If a proposer is certified as a small entrepreneurship under either the Hudson Initiative or the LaVet Program, it shall receive the full amount of the reserved points

5. *The paragraph before the chart and the chart with Qualification Criteria on page 15 Under “Section IV. Evaluation and Qualification Criteria and Selection Process” in section “D. Evaluation/Qualification Criteria” are modified as follows:*

The following Qualification Criteria with a point system of relative importance with aggregate total of 100 points will be utilized to evaluate the qualifications of each proposer.

<b>1. PROPOSER QUALIFICATIONS AND STAFFING (50 POINTS)</b> The Review Committee will consider qualifications and experience level of the firm, as well as its individual staff members, in performing financial advisory work. This will be based upon the information contained in the proposal and upon information obtained from references for comparable past work of assigned personnel.
<b>2. WORK MANAGEMENT PLAN (30 POINTS)</b> The Review Committee will consider whether the work management plan demonstrates a thorough understanding of the LHC's present economic and financial condition and accurately reflects the work that must be performed by a financial advisor in order to meet the LHC's objectives.
<b>3. COST PROPOSAL (10 POINTS)</b> The Review Committee will consider the Cost Proposal and the rationale provided by the proposer for determining a reasonable financial advisor fee. The Cost Proposal must provide both an hourly rate fee schedule for all general services and a separate fee and expense proposal for transactional related work products and any other categories the proposer feels maybe missing from the scope of services.
<b>4. HUDSON/VETERAN SMALL ENTREPRENEURSHIP PROGRAM (10 POINTS)</b>
<b>TOTAL POINTS (100 POINTS)</b>