



Homes and Community Renewal

Andrew M. Cuomo, Governor James S. Rubin, Commissioner/CEO

Request for Proposals for Professional Temporary Staffing Consultant Services

Issuance Date:

March 4, 2016

Submission Deadline:

April 14, 2016, 12PM EDT

**NEW YORK STATE HOUSING FINANCE AGENCY
STATE OF NEW YORK MORTGAGE AGENCY
NEW YORK STATE AFFORDABLE HOUSING CORPORATION
641 LEXINGTON AVENUE • NEW YORK, NEW YORK 10022**

Proposal Checklist

CHECKLIST FOR VARIOUS REQUIRED FORM RELATED ITEMS TO BE COMPLETED AND RETURNED:

- Tab I - Application Coversheet
- Tab I - Cover Letter

- Tab 2 – Technical Proposal

- Tab 3 – Cost Proposal

Tab 4:

- [Lobbying Reform Law Form 1](#)
- [Lobbying Reform Law Form 2](#)
- [Non-Collusive Bidding Certification Form](#)
- [Contractor and/or Vendor Information Form](#)
- [Vendor Responsibility Questionnaire – For Profit Business Entity OR Non-Profit Entity;](#)
- [EEO Staffing Plan, PROC-1](#)
- [MWBE Utilization Form, PROC-2 \(required if subcontracting with a MWBE\)](#)
- [MWBE & EEO Policy Statement, PROC-4](#)
- [Company Demographic Profile, PROC-7](#)
- [EEOC Statement, PROC-8](#)
- [Diversity Practices Questionnaire, PROC-9](#)
- Evidence of Insurance

Application Coversheet

Attach this form to the top of your proposal.

DATE OF APPLICATION:

GENERAL INFORMATION ON FIRM:

Legal Name of Firm:

Firm's Mailing Address:

Firm's Website:

Firm's Main Telephone Number (including area code):

Federal Tax ID Number:

SEC Registration Number (if applicable):

MWBE Registration Number (if applicable):

SDVOB Registration Number (if applicable):

MAIN CONTACT INFORMATION FOR THIS PROPOSAL:

Please list the individual that will be the main contact *regarding this proposal*:

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

PRINCIPAL IN CHARGE:

Please list the Firm's key personnel who will oversee services provided to the Agencies. Attach additional sheets if necessary.

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

ADDITIONAL CONTACTS (if applicable):

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

Contact Name:

Contact Telephone Number (including area code):

Contact E-mail Address:

Contact Facsimile Number (including area code):

Table of Contents

1.	Introduction.....	8
2.	Purpose.....	8
3.	Overview of the Agencies.....	9
3.1	New York State Housing Finance Agency.....	9
3.2	State of New York Mortgage Agency.....	9
3.3	New York State Affordable Housing Corporation.....	9
4.	Assessment of Diversity Practices and Matters Relating to Service-Disabled Veteran Owned Business Enterprises.....	9
4.1	Minority and/or Women Owned Business Enterprise Participation.....	10
4.2	Service-Disabled Veteran-Owned Business Enterprise Participation.....	10
4.3	MWBE and SDVOB Subcontractor Interest.....	10
5.	Calendar of Events and Milestones.....	11
6.	Scope of Services (Scope of Work).....	11
6.1	General Scope of Services (Scope of Work).....	11
6.1.1	Contractor Responsibilities.....	12
6.1.1.1	Affordable Care Act ("ACA").....	12
6.1.1.2	Background Check.....	12
6.1.1.3	Candidate's Eligibility to Work.....	13
6.1.1.4	Candidate Interviews.....	13
6.1.1.5	Contract Administrator.....	13
6.1.1.6	Key Deliverables.....	13
7.	Administrative Information.....	16
7.1	Questions and Answers.....	176
7.2	Amendments and Addenda.....	17
7.3	Restriction of Communication.....	17
7.4	Contract Terms.....	18
8.	Proposal Requirements.....	19
8.1	Proposal Submission Requirements.....	19
9.	Contents of Proposals.....	20
9.1	TAB 1: Cover Letter.....	20
9.2	TAB 2: Technical Proposal.....	21
9.3	TAB 3: Cost Proposal.....	23
9.4	TAB 4: Administrative Proposal.....	24
9.4.1	Insurance.....	24
9.4.2	Conflict of Interest.....	24
9.4.3	Disclosure of Commission Findings.....	24
9.4.4	Diversity Practices.....	255
10.	Performance and Selection Criteria.....	25
10.1	The Selection Process.....	25
10.2	Interviews.....	26
10.3	Selection and Notification Process.....	26
11.	Information relating to MWBEs, EEO and use of State Businesses.....	26
11.1	Contractor Requirements and Procedures for Business Participation Opportunities for New York State Certified Minority-and Women-Owned Business Enterprises and Equal Employment Opportunities ("EEO") for Minority Group Members and Women.....	26
11.1.1	New York State Law.....	26

11.1.2 Business Participation Opportunities for MWBEs 26
11.2 Equal Employment Opportunity Requirements 27
11.3 The Use of New York State Businesses in Contract Performance 28
Attachment 1: Confidentiality Pledge.....29
Attachment 2: Professional Temporary Staffing Consultant Descriptions.....32
Attachment 3: Cost Proposal Form.....35

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

**New York State Housing Finance Agency
State of New York Mortgage Agency
New York State Affordable Housing Corporation**

REQUEST FOR PROPOSALS

FOR

PROFESSIONAL TEMPORARY STAFFING CONSULTANT SERVICES

The Procurement Lobbying Law designated Contact Officer for this procurement is:

Alejandro J. Valella, Vice President and Deputy Counsel
New York State Homes & Community Renewal
New York State Housing Finance Agency
State of New York Mortgage Agency
New York State Affordable Housing Corporation
641 Lexington Avenue, 4th Floor
New York, New York 10022
Alex.Valella@nyshcr.org

1. Introduction

[New York State Homes and Community Renewal](#) (“**HCR**”) consists of all the major housing and community renewal agencies of the State of New York (“**State**”) including the New York State Housing Finance Agency (“**HFA**”), State of New York Mortgage Agency (“**SONYMA**”) and the New York State Affordable Housing Corporation (“**AHC**”) (individually, “**Agency**” and collectively, “**Agencies**” and individually or collectively, “**Agency(ies)**”). HCR includes other agencies not involved in this request for proposal (“**RFP**”) process.

2. Purpose

The Agencies seek competitive proposals from qualified professional temporary staffing consultant firms (“**Staffing Firms**”) to provide the Agencies with professional temporary staffing consultant services (“**Consultant Services**”) that include attorneys, certified public accountants (“**CPAs**”), human resource recruiters/assistants and underwriters. The general scope of services for the Consultant Services is described more fully in the Scope of Services section of this RFP. This RFP includes a list of identified consultant positions to address the Agencies’ current, most critical needs. Staffing Firms responding to this RFP (“**Respondents**”) are not required to have the ability to fill all listed consultant positions in order to reply to this RFP; however, those with previous

experience recruiting temporary employees in one or more areas of expertise are preferred. The Agencies reserve the right to utilize Staffing Firms awarded contracts resulting from this RFP, to select consultants for positions not listed in this RFP, and to amend position qualifications at any time.

3. Overview of the Agencies

The Agencies are public benefit corporations, co-located and co-administered from their New York City (“NYC”) office.

More detailed information relating to the Agencies and their respective programs may be found at the Agencies’ website www.nyshcr.org.

3.1 New York State Housing Finance Agency

The [New York State Housing Finance Agency](#) was created in 1960 to promote the production and preservation of affordable rental housing opportunities for low- to moderate- income citizens of the State. In 2015, as one of the primary issuers of municipal bonds for housing in the nation, HFA issued over \$1.7 billion of bonds to finance over 5,790 affordable units.

3.2 State of New York Mortgage Agency

The [State of New York Mortgage Agency](#) was created in 1970 to provide single-family homeownership opportunities for low- to moderate-income New Yorkers. The Agency funds its mortgage lending activities through the issuance of taxable and tax-exempt bonds. The Agency is the only State issuer of single family housing bonds. In 2015, the Agency issued over \$419 million in bonds and funded over 1,130 mortgages.

3.3 New York State Affordable Housing Corporation

The [New York State Affordable Housing Corporation](#) was established in 1985 to create homeownership opportunities for low- and moderate-income families by providing grants to local governments, not-for-profits, and charitable organizations, thus helping subsidize the cost of newly constructed houses and the renovation of existing housing.

4. Assessment of Diversity Practices and matters relating to Service-Disabled Veteran Owned Business Enterprises

The Agencies have determined, pursuant to New York State Executive Law Article 15-a (“**Article 15-a**”), that the assessment of the diversity practices of Respondents to this RFP is practical, feasible, and appropriate.

4.1 Minority and/or Women Owned Business Enterprise Participation

The Agencies are committed to awarding contracts to firms that are dedicated to diversity and provide high-quality services. The Agencies strongly encourage firms that are certified by the State as minority-and/or women-owned business enterprises (“**MWBEs**”), as well as firms that are not yet certified, but have applied for certification, to submit responses to this RFP. All MWBE firms submitting proposals to this RFP should be registered as such with the State’s Department of Economic Development. For MWBE firms that are not certified but have applied for certification, please provide evidence of filing, including the filing date.

The Agencies strongly encourage partnering arrangements of MWBE firms with majority firms and MWBE firms with other MWBE firms. For assistance identifying MWBE partners, review the [directory of certified State MWBEs](#) hyperlinked herein, visit the [State’s Division of MWBE Development webpage](#) also hyperlinked herein, or contact Assistant Contract Administrator, Berniesha Coleman at Berniesha.Coleman@nyshcr.org.

For purposes of this solicitation, the Agencies hereby establish an overall goal of 30% for MWBE participation, 15% for minority-owned business enterprises (“**MBEs**”) and 15% for women-owned business enterprises (“**WBEs**”). The Agencies encourage majority Staffing Firms to subcontract with MWBEs, however it is not a requirement of this RFP. The Agencies anticipate meeting their overall 30% MWBE participation goal by (i) directly contracting with MWBEs and (ii) contracting with majority Staffing Firms that elect to subcontract with MWBEs.

4.2 Service-Disabled Veteran-Owned Business Enterprise Participation

The Agencies are committed to awarding contracts to service-disabled veteran-owned business enterprises (“**SDVOBs**”) to provide high-quality services. The Agencies strongly encourage firms that are certified as SDVOBs, as well as firms that are not yet certified, but have applied for certification, to submit responses to this RFP. All SDVOB firms submitting proposals to this RFP should be registered as such with the State’s Office of General Services. For SDVOBs that are not certified but have applied for certification, please provide evidence of filing, including the filing date. For assistance identifying SDVOB partners, review the [list of certified State SDVOBs](#) hyperlinked herein, visit the [State’s SDVOB webpage](#) also hyperlinked herein, or contact Assistant Contract Administrator, Berniesha Coleman at Berniesha.Coleman@nyshcr.org.

4.3 MWBE and SDVOB Subcontractor Interest

New York State (“**NYS**”) certified MWBEs may request that their firm’s contact information be included on a list of MWBE firms interested in serving as a subcontractor for this RFP. The listing will be publicly posted on the Agencies’ website for reference by the bidding community. A firm requesting inclusion on this list should send contact information and a copy of its NYS MWBE certification to Berniesha.Coleman@nyshcr.org. Nothing prohibits an MWBE from proposing as a prime contractor.

5. Calendar of Events and Milestones

It is anticipated that the Agencies will select one or more Staffing Firms, eligible for contract awards, in response to this RFP based on the following schedule:

Event	Date
Issuance of RFP	March 4, 2016
Deadline for RFP Questions	April 1, 2016, 12PM EDT
Deadline for Responses to RFP Questions	April 7, 2016
Deadline for Submission of Proposals	April 14, 2016, 12PM EDT
Interview Notification (if needed)	Week of April 25, 2016
Interview for Selected Respondents (if needed)	Weeks of May 2 and 9, 2016
Anticipated Selection Date*	June 9, 2016

*Subject to the approval of the Agencies' Board Members and Directors (“Boards”).

The Agencies reserve the right to modify this schedule at their discretion. Notification of changes in connection with this RFP will be made available to all interested parties via the Agencies' web page at: <http://www.nyshcr.org/AboutUs/Procurement/HCR-Procurement.htm>.

6. Scope of Services (“Scope of Work”)

6.1 General Scope of Services (Scope of Work)

The Agencies expect to enter into one or more contracts with one or more Staffing Firms, on an as needed basis.

The following qualifications for positions provide a guideline to the Agencies' preference; however, candidates of the Staffing Firm who do not possess all of the qualifications listed may be considered. Respondents are not required to have the ability to fill all requested positions in order to reply to this RFP.

Accounting Consultants:

- Certified Public Accountant
- Accountant

Underwriter Consultants:

- Junior Underwriter
- Senior Underwriter
- Underwriter

Legal Consultants:

- Attorney
- Legal Assistant

Human Resource Consultants:

- Human Resource Recruiter
- Human Resource Assistant

6.1.1 Contractor Responsibilities

Prior to placement of temporary staff with the Agencies, the successful Staffing Firm(s) (“**Contractor(s)**”) must comply with a series of requirements for each proposed candidate. The Contractor shall provide this information in the form and manner requested by the Agencies as described below.

6.1.1.1 Affordable Care Act (“ACA”)

It is the sole responsibility of the Contractor to provide and maintain all Affordable Care Act requirements/benefits. The ACA mandates employers with 50 or more full-time equivalents to offer coverage to full-time employees and their dependents or pay taxes if an employee obtains Exchange coverage and a premium tax credit¹. However, as stated herein, the temporary staff to be provided to the Agencies are employees of the Contractor and are not employed by any Agency nor the State of New York.

6.1.1.2 Background Check

The Contractor shall complete, at its own expense, an industry standard criminal history background check and all sound screening practices prior to a candidate’s official start date at the Agencies.

¹ . Exchange coverage allows you to use the State’s insurance exchange marketplace to obtain coverage from competing private health care providers.

6.1.1.3 Candidate's Eligibility to Work

The Contractor must ascertain and validate that the proposed candidate is either a U.S. citizen or non-U.S. citizen as follows:

- Where the proposed candidate is a U.S. citizen, the Contractor must identify the proposed candidate with, at a minimum, the first and last name of the candidate as it appears on his/her driver's license, non-driver's identification card, or other accepted form of government identification;
- Where the proposed candidate is not a U.S. citizen, the Contractor shall identify such to the Agencies and, at a minimum, provide the Agencies with the first and last name of the candidate as it appears on his/her Visa and/or Passport. No other names or derivations may be used.

The Contractor must retain all necessary paperwork throughout the length of each successful candidate's ("**Consultant**") engagement with the Agencies. The Contractor is responsible for ensuring that each Consultant retains the authorization to legally work in the U.S. throughout the term of the engagement.

6.1.1.4 Candidate Interviews

The Agencies reserve the right to interview a candidate, either in-person, by telephone, and/or via webcasting, to determine his/her qualifications. The qualifications must reflect the position of the specific job title requested. The Agencies reserve the right to reject any candidate if the Agencies determine that the candidate is not qualified based on the specified skill level and minimum requirements.

6.1.1.5 Contract Administrator

Contractor shall provide a dedicated Contract Administrator to support the updating and management of the awarded Contract on a timely basis. This individual will act as a primary point of contact for the Agencies. The Contract Administrator shall fully understand the terms and conditions of the contract between the Agencies and the Contractor. The Contract Administrator shall be a person at the Contractor's management level. The position cannot be staffed by the Contractor's clerical personnel.

6.1.1.6 Key Deliverables

The key deliverables provided by a Respondent must include:

- An effective screening process in place that includes sophisticated screening methods, such as personal interviews, reference checks, criminal background checks or social security tracing; ability to provide the Agencies with needed help during peak demand periods, staffing shortages, or the vacations of regular Consultants;

- Maintenance of a pool of candidates sufficient to meet the needs of the Agencies within a reasonable time of being requested;
- Assurance that the Consultant reports to work at the time and place specified by the Agencies;
- Replacement of any Consultant not performing satisfactorily, at no additional expense to the Agencies and within a reasonable time;
- Adherence to all ordinances and laws pertaining to the Agencies' operation and ability to secure all required licenses and permits in a timely manner;
- Ability to describe the job duties required to the Consultant;
- Perform all services provided in the contract in accordance with customary and reasonable industry standards;
- Arrange for the Agencies to interview potential new candidates; and
- Provide candidates that meet the qualifications for the job descriptions below.

Consultant Services:

A complete list of requirements for each position can be found in Attachment 2, attached hereto.

Accounting Consultant Positions:

➤ **Certified Public Accountant:**

The Certified Public Accountant will review program financial statements and prepare program related reports and project analysis. Duties will include verifying bank transactions to source documents, reviewing bank reconciliations and prompt follow-up on outstanding items. Other duties include reviewing transaction postings to the General Ledger from feeder systems (investment, mortgage billing, etc.), to review/establish monthly mortgage billing to projects, manage internal, external, and State audit processes, develop Agency-wide financial statement reporting model, assist in preparation of comprehensive accounting policy and procedures manual, and manage other accountants in the group.

➤ **Accountant:**

The Accountant will prepare and review program financial statements and related reports and project analysis, as well as keying accounting transactions to the General Ledger, verification of bank transactions to source documents, performing bank reconciliations and follow-up on outstanding items, reviewing transaction postings to the General Ledger from the feeder system, and review/establish monthly mortgage billing to projects. The Accountant will be responsible for responding to inquiries from projects, internal and external auditors, Agency staff and other State agencies where necessary. Other duties include preparing program delinquency reports and analysis, requisition of funds based on audit of expenses or certifications of drawdown, disbursement and monitoring of grant funds, entry and allocating of daily mortgage receipts, and audit and problem resolution for investment system postings.

Underwriter Consultant Positions:

➤ **Underwriter:**

The primary duty of the Underwriter is to underwrite and originate mortgages for affordable multifamily housing. This position will evaluate project feasibility and eligibility and determine loan amounts. In addition to financial and quantitative analysis, the Underwriter will

assess qualitative factors such as the experience of developers, contractors and property managers. The Underwriter serves as the primary contact between HFA and its borrowers, secures necessary internal approvals and advances projects to the Credit and Policy Committee.

➤ **Senior Underwriter:**

The Senior Underwriter will perform underwriting of construction and permanent financing for multifamily housing that utilize tax exempt and taxable bonds, tax credits, as well as a variety of housing subsidy loan sources deployed by the Agency. Primary responsibility is to determine project eligibility, loan amount and appropriate structures of multifamily transactions, in accordance with the HFA's statute, regulations, and underwriting guidelines. Other duties include: (i) structuring and underwriting the more complex transactions reviewed by the Multi-family unit; (ii) assisting the Senior Vice President and the Vice President in projects relating to developing new financing structures; and (iii) attending meetings with prospective borrowers to develop new business.

➤ **Junior Underwriter:**

The primary duty of the Junior Underwriter is to assist in the underwriting and origination of mortgages for affordable multifamily housing. Working under the guidance of an experienced underwriting team, this position will help evaluate project feasibility and eligibility, and determine loan amounts. In addition to financial and quantitative analysis, the Junior Underwriter will assist in assessing qualitative factors such as the experience of developers, contractors and property managers. The Junior Underwriter will facilitate communication between HFA and its borrowers, help secure necessary internal approvals, and assist senior staff in advancing projects to the Credit and Policy Committee.

Legal Consultants:

➤ **Attorney:**

The Attorney or Attorneys will be responsible for providing all required legal work on the Agencies' multi-family housing mortgage loan financings, where the Agencies act as mortgage lender, and will be required to possess expertise in real estate mortgage financing and in affordable housing transactions. Since the Agencies generate their funds primarily by issuing tax-exempt municipal bonds, the Attorney or Attorneys will be expected to be familiar with municipal finance and securities laws. As part of their duties, the Attorneys will be responsible for, among other things, all legal work in connection with the Agencies' mortgage loan closings. The Attorney or Attorneys will also perform legal services related to the Agency's loan management, mortgage enforcement efforts, and architect and construction contract.

➤ **Senior Legal Assistant Analyst :**

The Senior Legal Assistant Analyst will be responsible for assisting attorneys in the legal department with research and preparation of memoranda relating to bond issuance matters, board matters, corporate governance matters, procurement matters, housing financing matters, and various other Agency matters. The Senior Legal Assistant Analyst will also perform a wide range of tasks including, but not limited to: performing general legal research; attending bond and mortgage closings; preparing closing binders; assisting with drafting and tracking contracts; and tracking and digesting legislation.

Human Resource Consultants:

➤ **Human Resource Assistant:**

The Human Resource Assistant will be responsible for assisting in the monthly billing and reconciliation of the Agencies' dental, health, long term disability, unemployment, and life insurances. Requirements include updating the HRIS with employee personal information, salaries, pension number, etc. The Human Resource Assistant will be expected to act as a backup to the Senior Executive Assistant for the Commissioner/CEO, in conjunction with other duties, such as, coordinating the schedule for all travel arrangements and expenses of the Agencies' Vice President/Director of the human resource unit, and managing calendar items and appointments. Other responsibilities include preparing reports for executive staff, tracking employee probation periods, providing administrative support and assisting with special projects.

➤ **Human Resource Personnel Recruiter:**

The Human Resource Personnel Recruiter will (i) assist the Agencies with sourcing for qualified candidates in accordance to relevant job criteria, (ii) prescreen candidates for job qualifications, (iii) coordinate background checks, (iv) establish and maintain contact with applicants/candidates for matters relating to employment process, salary inquiries, and consideration and selection, and (iv) perform other related matters as directed by the Agencies.

Note that while the duration of each position may vary, the average length of each assignment will be at for at least a six month period. Consultants are anticipated to work 37.5 hours per week, 7.5 hours per day. Assignments will be made on an as needed basis.

7. Administrative Information

7.1 Questions and Answers

Any questions or requests for clarification regarding this RFP must be submitted via email to Nyhomes.Proposal@nyshcr.org and Berniesha.Coleman@nyshcr.org, citing the RFP page and section, no later than the date identified in the "*Calendar of Events and Milestones*" section of this RFP. The "Subject" line of the email should indicate "2016 Staffing Questions."

Questions will not be accepted orally and any question received after the deadline may not be answered. The list of questions/requests for clarifications and the official Agency responses will be posted in a timely manner on [HCR's "Procurement Opportunities" webpage](#).

Respondents should note that all clarifications and exceptions are to be resolved prior to submission of the proposal.

An electronic version of this RFP will be posted on [HCR's website](#) in addition to any subsequent changes, additions or deletions to the RFP, including the timelines and target dates. Respondents are encouraged to check the [HCR website](#) frequently for notices of any clarifications, changes, additions, or deletions to the RFP.

7.2 Amendments and Addenda

The Agencies reserve the right to modify any part of this RFP including, but not limited to, the date and time by which proposals must be submitted and received by the Agencies, at any time prior to the Deadline for Submission of Proposals date listed in the “*Calendar of Events and Milestones*” section of this RFP. Modifications to this RFP will be made by issuance of amendments and/or addenda. Any amendment or addendum to this RFP will become part of this RFP.

Prior to the Deadline for Submission of Proposals date, any such clarifications or modifications as deemed necessary will be posted to [HCR’s website](#).

If the Respondent discovers any ambiguity, conflict, discrepancy, omission, or other error in this RFP, the Respondent will immediately notify the Agencies of such error in writing and request clarification or modification of the document.

There are no designated dates for release of addenda. Therefore, interested Respondents should check the Agencies’ website frequently through the Deadline for Submission of Proposals date. It is the sole responsibility of the Respondent to be knowledgeable of all addenda related to this RFP process.

7.3 Restriction of Communication

Pursuant to State Finance Law (“SFL”) §§139-j and 139-k, this RFP imposes certain restrictions on communications between the Agencies and their Affiliates (including the State of New York Municipal Bond Bank Agency, Tobacco Settlement Financing Corporation, Housing Trust Fund Corporation and the State’s Division of Housing and Community Renewal, other agencies constituting HCR), and a potential Respondent during the procurement process. A Respondent is restricted from making contacts that a reasonable person may infer were intended to influence the selection of a firm or company to perform (or provide) the proposed professional services (or goods) in this RFP, from the date of publication of this RFP until the awarding of a contract(s) by the Agencies (the “**Restricted Period**”) with any person other than the designated staff member named below, unless it is a contact that is included among certain statutory exceptions set forth in SFL §139-j(3)(a). Employees of the Agencies, including any employees of the agencies that constitute HCR, are required to obtain certain information when contacted during the Restricted Period and make a determination of responsibility of the Respondent under the SFL. Findings of non-responsibility can result in rejection for contract award and in the event of two (2) findings within a four (4) year period, the Respondent will be debarred from obtaining governmental contracts.

For further information, please refer to the following website: <http://www.ogs.ny.gov/aboutogs/regulations/advisoryCouncil/Faq.htm>.

For all Lobbying Law Contacts, please contact:

Alejandro J. Valella, Vice President and Deputy Counsel
New York State Homes & Community Renewal
HFA. SONYMA. AHC
641 Lexington Avenue, 4th Floor
New York, New York 10022
Alex.Valella@nyshcr.org

If you have inquiries regarding this RFP or would like to contact the Agencies regarding issues not relating to Lobbying Law Contacts, please contact:

Berniesha Coleman, Assistant Contract Administrator
New York State Homes & Community Renewal
HFA. SONYMA. AHC
641 Lexington Avenue, 4th Floor
New York, New York 10022
Berniesha.Coleman@nyshcr.org and Nyhomes.Proposal@nyshcr.org

Other than the two contact persons identified above, prospective Respondents shall not approach Agency employees, or any employees of the agencies that constitute HCR, during the Restricted Period about any matters related to this RFP or any proposal(s) submitted pursuant thereto.

7.4 Contract Term

The term of the contract(s) will be for a period of five years, subject to approval by the Agencies' respective Boards and annual review of the contract(s) by the Boards. Any contract that exceeds a five (5) year period will require the affirmative concurrence of the Agencies' Boards to extend the contract(s) beyond five (5) years without undergoing a new solicitation process. In addition, the Agencies, at their discretion, may exercise their option to revise any provision of the contract, on an as needed basis, with the mutual written consent of the contracting parties.

The successful Respondent(s) will be required to execute a Professional Temporary Staffing Consultant Services Agreement with the Agency(ies) that incorporates Appendix I [*Standard Clauses for Contracts*](#), hyperlinked herein, together with a Confidentiality Pledge signed by both the Respondent and each Consultant, attached hereto as Attachment 1.

Further, any successful Staffing Firm entering into a contract with any Agency does so with the understanding that the Agencies may or may not engage the Contractor during the course of the contract period.

8. Proposal Requirements

A complete proposal for this RFP is comprised of four (4) separate tabs: (i) Tab One: Application Cover Sheet and Cover Letter; (ii) Tab Two: Technical Proposal; (iii) Tab Three: Cost Proposal; and (iv) Tab Four: Administrative Proposal.

Proposals must be complete and prepared in a format consistent with the instructions provided in this RFP. In all instances, the Agencies' determination regarding a proposal will be final. Proposals not organized in the manner prescribed in this RFP may be considered non-responsive at the Agencies' sole discretion. Respondents should not refer to other parts of the proposal, to information that may be publicly available elsewhere, or to the Respondent's or other websites in lieu of answering a specific question.

8.1 Proposal Submission Requirements

Respondents shall deliver proposals, by email, no later than the proposal due date and time indicated in the "*Calendar of Events and Milestones*" section of this RFP.

Respondents shall submit proposals to Nyhomes.proposal@nyshcr.org in searchable portable document format ("**PDF**") compatible with Adobe Reader XI. The Agencies will not accept discs, flash drives, or FTP file references that require the Agencies to download information from the Respondent's or a third party's site. If the file is large, it may be submitted in multiple email attachments, with the proper Part One or Part Two label (if applicable) and "1 of X", "2 of X", etc., and the last email as "X of X – Final" for each additional email.

Bookmark the proposal divided into four parts: (i) Tab One: Application Cover Sheet and Cover Letter; (ii) Tab Two: Technical Proposal; (iii) Tab Three: Cost Proposal; and (iv) Tab Four: Administrative Proposal. Submit proposals in two emails labeled as follows: (a) one email to include Tabs One and Two and the subject line of the email labeled "2016 Staffing Services: Tabs 1 and 2"; and (b) the other email to include Tabs Three and Four and the subject line of the email labeled "2016 Staffing Services: Tabs 3 and 4".

Any proposal delivered after the date and time designated as the proposal submission deadline date listed in the "*Calendar of Events and Milestones*" section of this RFP may be deemed ineligible. It is the Respondent's sole responsibility to ensure that completed proposals are delivered on time in a legible format. Respondents assume all risk for proposal delivery.

A proposal may be deemed to be non-responsive because it is materially incomplete. The Agencies reserve the right to seek clarification or request additional information.

The determination of whether any proposal is complete or was received on time is at the sole discretion of the Agencies.

All submitted proposals shall become the property of the Agencies.

9. Contents of Proposals

The Respondent must submit a proposal that clearly provides all of the information required in this RFP. Emphasis should be made on conformance to the RFP instructions, responsiveness to the RFP requirements, and clarity of content. The Respondent is advised to thoroughly read and follow all instructions contained in this RFP. Proposals that do not comply with these instructions, or do not meet the full intent of all the requirements of this RFP may be subject to scoring reductions during the evaluation process or may be deemed non-responsible.

The Agencies do not require, nor desire, any promotional material that does not specifically address the response requirements of this RFP.

Proposals should demonstrate that the Respondent is qualified to perform the Scope of Work based upon prior relevant professional experience. An Agency review committee will conduct a comprehensive review of each proposal.

Each Respondent is required to submit the information and documentation listed below in the order in which it is requested. A proposal that does not include all required information and completed forms may be subject to rejection.

The completed proposal will include Tabs One through Four, as described in the Proposal Submission Requirements section of this RFP. Each Tab must be bookmarked as “Tab 1,” “Tab 2,” “Tab 3,” and “Tab 4” and must be presented in the exact order requested in this RFP. The content in Tab 2 must be limited to five (5) letter-size pages (single or double spaced, minimum 12 point font, and at least one inch margins). The five (5) page limit does not include resumes, references, organizational chart, etc.

The Respondent’s proposal should contain the following tabs:

9.1 TAB 1: Cover Letter

The Respondent’s cover letter must not exceed three (3) pages and should include:

1. A summary of the Respondent’s organizational history and legal structure (e.g. individual practitioner, partnership, LLC, corporation, non-profit organization, evidence of MWBE and/or SDVOB certification status, etc.);
2. A statement affirming the Respondent’s number of years of experience in providing Consultant Services;
3. A statement indicating the types of professional temporary staffing consultant services provided by the Respondent (i.e., underwriters, attorneys, CPAs, human resource);
4. The Respondent’s name, address, telephone number, fax number, email address and web site address, if applicable;

5. The name, title, telephone number, fax number and email address of the individual within the Respondent's organization who will be the Agencies' primary contact concerning the proposal;
6. The name(s) of the primary staff (or key personnel)² within the Staffing Firm who will manage an awarded contract between the Staffing Firm and the Agencies;
7. If subcontracting, the contact name, telephone number, fax number and email address for the subcontractor Staffing Firm(s) with which the Respondent intends to enter into a MWBE and/or SDVOB subcontract agreement for engagements with any Agency; and
8. A written certification confirming that the information contained in the proposal is true and accurate and that the person signing the cover letter is authorized to submit the proposal on behalf of the Respondent.

9.2 TAB 2: Technical Proposal

This section of the RFP provides instructions to Respondents regarding information that is to be included in the Technical Proposal. Proposals must be complete, factual and as detailed as necessary to allow the Agencies to adequately evaluate capabilities and experience.

The purpose of the Technical Proposal is to provide the Respondent an opportunity to demonstrate its qualifications, competence and capacity to undertake the Scope of Work described herein, in a manner which complies with the requirements of this RFP. Proposals should specifically detail a Respondent's qualifications and experience in providing services sought by the Agencies (including the experience of its subcontractors, where applicable).

The contents in Tab 2 must address the following items:

1. Provide a description of your Staffing Firm's organization, including, without limitation, a list of directors, officers, principals, partners and shareholders, as applicable.
2. Briefly describe your Staffing Firm's qualifications and experience to provide Consultant Services in one or more of the following areas: (i) underwriting; (ii) accounting; (iii) legal (attorneys); and/or (iv) human resources.

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

² The terms "primary staff" and "key personnel" are used interchangeably and are defined as employees of the Staffing Firm who have the authority to make decisions and execute contracts on behalf of the Staffing Firm together with the principal employee(s) who will manage the contractual relationship between the successful Staffing Firm and the Agencies.

3. Identify the principals and the permanent in-house employees who will be the Staffing Firm's key personnel, primarily responsible for overall management of the account and the recruiting, screening and placement of successful candidates with the Agencies, including resumes of such key personnel, and:
 - a. A summary of the types of services your Staffing Firm offers that relates to this RFP;
 - b. Documentation evidencing your Staffing Firm's capability and method of properly vetting each candidate, your recruiting process, and thoroughness of the pre-screening process (see Scope of Work section of this RFP);
 - c. A summary of your Staffing Firm's ability to provide results of a background investigation check and vetting process;
 - d. A description of your Staffing Firm's employee recruitment practices and any training provided for temporary staffing employees;
 - e. A description of the credentials and qualifications your Staffing Firm requires of your employees;
 - f. A description of how your Staffing Firm will handle performance and employee relation issues with temporary staff provided to the Agencies as Consultants;
 - g. In the event that the Agencies had emergency temporary staffing needs resulting from an unresolved matter relating to (f) above, briefly describe how temporary staffing would be provided to us and the amount of time this process would take; and
 - h. Briefly describe the steps your Staffing Firm will take to ensure implementation needs are met.
4. Provide a representative sampling (approximately 2 to 5) of resumes per temporary staffing position in your Staffing Firm's portfolio, with redacted personal and company contact information, that meet the minimum qualifications described for the underwriting, accounting, human resource and legal temporary staffing positions described in the Scope of Work section of this RFP.
5. Briefly describe how your Staffing Firm will meet the Agencies' needs relating to (i) background checks, (ii) candidate's eligibility to work, (iii) candidate interviews; and (iv) contract administrator, as more fully described in the Scope of Work section of this RFP.
6. Discuss your Staffing Firm's presence in New York State including any offices maintained in the State, the number of staff employed in the State and the number of staff to be assigned to the Agencies who are employed in the State.
7. Provide specific details on previous, or current, experience with the Agencies, if applicable. In addition, identify any engagement with entities comparable to the Agencies for which the Respondent provides, or has provided, similar services within the last five (5) years. Detailed information should be provided in tabular form in an appendix which will not be counted as part of the 5 page limit. Each example should include:
 - a. Name of client organization;
 - b. Description of engagement and objectives of the project including start and end dates;
 - c. Examples of recommendations offered to the client and the results of the implementation of those recommendations;

- d. Any information or feedback regarding the project that would demonstrate successes experienced by the client as a result of the recommendations. This may include performance metrics and improvements; and
 - e. Whether the contract was terminated before the end of the term specified in the original contract, including whether any available renewal option was not exercised.
8. Provide at least three (3) references for the Respondent. In addition, if the Respondent chooses to partner or sub-contract with a MWBE or SDVOB firm, provide three (3) references for any partners or sub-contractors. Each reference should include the name, title, company, address, phone number and email address of the reference, and a brief summary of the relationship between the reference and the Respondent and, if applicable, the subcontractor.
 9. If subcontracting with a MWBE and/or SDVOB, describe the types of tasks to be subcontracted. All subcontractors of the selected Staffing Firm(s) prior to and after the issuance of a contract(s) will be subject to prior written approval by the Agencies.

9.3 TAB 3: Cost Proposal

All Respondents must complete the Cost Proposal Form, attached hereto as Attachment 3.

Respondents are required to use the titles provided, even if these titles are not consistent with the Respondent's existing titles.

The cost proposal must include:

- The range of rates for each title, commensurate with experience;
- The rates provided in the proposal must be the all-inclusive (any reproduction, travel, postage, or other expenses) not to exceed hourly rate (U.S. dollars) for each title described.
- List rates for a three-year period and escalation rate, if any, for the remaining two-year period.
- The rates included in the proposal should be the Respondent's lowest discounted governmental rates.

Respondents must also submit their current cost structure for the following fee:

- **Permanent Placement Fee:** Respondents must identify fees or costs, if any, associated in the event the Agencies choose to offer full time employment to a previously placed temporary resource. Respondents must provide a cost structure or fee schedule that clearly defines the rates along with any and all associated costs. Indicate instances where the permanent placement fee may be waived or reduced.

The Cost Proposal Form (Attachment 3) must be signed by an authorized signatory of your Staffing Firm. Attachment 3 includes the following terms:

“**Bill Rate**” refers to the hourly fee that the Contractor will receive from the Agencies for the services provided to the Agencies by the Consultant under a contract between the Contractor and the Agencies.

“**Wage Rate**” refers to the hourly rate that the Contractor will pay the Consultant that provided services to the Agencies.

“**Markup**” refers to the difference between the Contractor’s bill rate and wage rate.

9.4 TAB 4: Administrative Proposal

Respondents are subject to the requirements described in the [Agencies’ Standard Clauses and Requirements for Solicitations](#), hyperlinked herein as Exhibit A. Such requirements include, but are not limited to, submission of the following information and forms of the Agencies: (a) [Lobbying Procurement Law FORM 1](#) and [Lobbying Procurement Law FORM 2](#); (b) [Non-Collusive Bidding Certification FORM](#); (c) [Contractor and Vendor Information FORM](#); (d) [Vendor Responsibility Questionnaire for For-Profit Business Entity](#); (e) [EEO Staffing Plan, PROC-1](#); (f) [MWBE & EEO Policy Statement, PROC-4](#); (g) [Company Demographic Profile PROC-7](#); (h) [EEOC Statement, PROC-8](#), applicable to Respondents with 15 or more employees; (i) [Diversity Practices Questionnaire, PROC-9](#); and, if subcontracting, (j) [MWBE Utilization Form, PROC-2](#).

In addition to completion of the forms hyperlinked in the paragraph above, Respondents must provide the following information:

9.4.1 Insurance

Provide evidence of errors and omissions coverage with a minimum limit of liability in the amount of \$1,000,000 per occurrence.

9.4.2 Conflict of Interest

Disclose any existing or contemplated relationship with any other person or entity, including relationships with any parent, subsidiary or affiliated firm, which would constitute an actual or potential conflict of interest or appearance of impropriety, relating to other clients/customers of the Respondent or former officers and employees of the Agencies and their Affiliates, in connection with your rendering services enumerated in this RFP. If a conflict does or might exist, please describe how your Staffing Firm would eliminate or prevent it. Indicate what procedures will be followed to detect, notify the Agencies of, and resolve any such conflicts.

9.4.3 Disclosure of Commission Findings

The Respondent must disclose whether its entity, or any of its members discussed in the above paragraph, has been the subject of any investigation or disciplinary action by the New York State Commission on Public Integrity or its predecessor State entities (collectively, “**Commission**”), and if so, a brief description must be included indicating how any matter before the Commission was resolved or whether it remains unresolved.

9.4.4 Diversity Practices

Respondents must provide the following information:

If the Respondent (or its subcontractor) is a State-certified MWBE firm, provide documentation evidencing registration. For MWBE firms that are not certified but have applied for certification, provide documentation evidencing their application with the Empire State Development Corporation, including the filing date.

10. Performance and Selection Criteria

10.1 The Selection Process

The selection process will begin with the review and evaluation of each of the written proposals. The purpose of the evaluation is two-fold: (1) to examine the responses for compliance with this RFP; and (2) to identify the Staffing Firm(s) with the highest probability of satisfactorily performing the Scope of Work, described herein. The evaluation will be conducted in a comprehensive and impartial manner as set forth herein.

The submitted proposals will undergo an evaluation process conducted by a committee selected by the Agencies. Evaluation of the proposals will take into account the following criteria that includes, but is not limited to:

- Demonstrated capacity to perform the types of services which have been described herein;
- Experience in executing and delivering professional temporary staffing consultant services;
- The price for the Staffing Firm's services;
- Maintenance of an office in the State of New York³;
- Diversity Practices; and
- Interviews to clarify or expand on the responses (to be conducted at the Agencies' discretion)

³ It is the preference of the Agencies for Staffing Firm's to maintain an office in the State; however it is not requirement of this RFP. Staffing Firms must have [authority to do business in the State of New York](#) upon execution of an awarded contract.

10.2 Interviews

The Agencies reserve the right to determine whether interviews will be necessary and the number of Staffing Firms to be interviewed. If the Agencies deem interviews necessary, interviews will be held during the dates specified in the “*Calendar of Events and Milestones*” section of this RFP. The Respondent’s key personnel who would be responsible for the Agencies’ relationship with the Respondent, as well as other key personnel proposed to provide services, including any partners or subcontractors, must be present and participate in the interview. The purpose of the interview is to further document the Respondent’s ability to provide the required services, and to impart to the Agencies’ Committee an understanding of how specific services will be furnished. The interview will be evaluated on the basis of whether it substantiates the characteristics and attributes claimed by the Respondent in its written response to this RFP and any other information requested by the Committee prior to the interview.

The Agencies reserve the right to negotiate or hold discussions with any Respondent.

10.3 Selection and Notification Process

The selected Respondents will be notified via U.S. mail or email. Respondents who are not selected will be notified of the Agencies’ determination via U.S. mail or email.

11. Information relating to MWBEs, EEO and use of State Businesses

11.1 Contractor Requirements and Procedures for Business Participation Opportunities for New York State Certified Minority-and Women-Owned Business Enterprises and Equal Employment Opportunities (“EEO”) for Minority Group Members and Women

11.1.1 New York State Law

Pursuant to New York State Executive Law Article 15-A and 5 NYCRR 140-145, the Agencies recognize their obligation under the law to promote opportunities for maximum feasible participation of certified minority-and women-owned business enterprises and the employment of minority group members and women in the performance of Agency contracts.

In 2006, the State of New York commissioned a disparity study to evaluate whether MWBEs had a full and fair opportunity to participate in State contracting. The findings of the study were published on April 29, 2010, under the title ["The State of Minority and Women-Owned Business Enterprises: Evidence from New York" \(“Disparity Study”\)](#). The report found evidence of statistically significant disparities between the level of participation of MWBEs in State procurement contracting versus the number of MWBEs that were ready, willing and able to participate in State procurements. As a result of these findings, the Disparity Study made recommendations concerning the implementation and operation of the State-wide certified minority- and women-owned business enterprises program. The recommendations from the

Disparity Study culminated in the enactment and the implementation of New York State Executive Law Article 15-A, which requires, among other things, that the Agencies establish goals for maximum feasible participation of New York State certified MWBEs and the employment of minority groups members and women in the performance of New York State contracts.

11.1.2 Business Participation Opportunities for MWBEs

For purposes of this solicitation, the Agencies hereby establish an overall goal of 30% for MWBE participation, 15% for NYS certified MBE participation and 15% for NYS certified WBE participation (based on the current availability of qualified MBEs and WBEs).

11.2 Equal Employment Opportunity Requirements

By submission of a bid or proposal in response to this solicitation, the Bidder/Contractor agrees with all of the terms and conditions of [Appendix I – Standard Clauses for All New York State Contracts including Clause 7 - Equal Employment Opportunities for Minorities and Women.](#)

The Bidder will be required to submit a [Minority and Women-Owned Business Enterprises and Equal Employment Opportunity Policy Statement, PROC-4 Form](#) to the Agencies with their bid or proposal.

To ensure compliance with this Section, the Bidder will be required to submit with the bid or proposal an [Equal Employment Opportunity Staffing Plan PROC-1 Form](#), identifying the anticipated work force to be utilized on the Contract and if awarded a Contract, will, upon request, submit an [Equal Employment Opportunity Workforce Employment Utilization Compliance Report](#) identifying the workforce actually utilized on the Contract, if known, through the New York State Contract System; provided, however, that a Bidder may arrange to provide such report via a non-electronic method by contacting Ms. Lisa G. Pagnozzi at Berniesha.Coleman@nyshcr.org and Nyhomes.Proposal@nyshcr.org.

Further, pursuant to Article 15 of the Executive Law (the “**Human Rights Law**”), all other State and Federal statutory and constitutional non-discrimination provisions, the Contractor and sub-contractors will not discriminate against any employee or applicant for employment because of race, creed (religion), color, sex, national origin, sexual orientation, military status, age, disability, predisposing genetic characteristic, marital status or domestic violence victim status, and shall also follow the requirements of the Human Rights Law with regard to non-discrimination on the basis of prior criminal conviction and prior arrest.

Please Note: Failure to comply with the foregoing requirements may result in a finding of non-responsiveness, non-responsibility and/or a breach of the Contract, leading to the withholding of funds, suspension or termination of the Contract or such other actions or enforcement proceedings as allowed by the Contract.

11.3 The Use of New York State Businesses in Contract Performance

The Agencies are committed to awarding a contract to a firm that will provide high-quality services at a reasonable and competitive cost and will substantially perform the Scope of Work, as described in this RFP, from an office(s) or location(s) within New York State.

New York State businesses have a substantial presence in State contracts and strongly contribute to the economics of the State and the nation. In recognition of their economic activity and leadership in doing business in New York State, Respondents for this Agency procurement are strongly encouraged and expected to consider New York State businesses in the fulfillment of the requirements of the Agency awarded contract. Such partnering may be as subcontractors, suppliers, protégés, providers of office and work space, and/or other supporting roles.

Respondents need to be aware that all authorized users of the awarded contract will be strongly encouraged, to the maximum extent practical and consistent with legal requirements, to use responsive New York State businesses in purchasing commodities that are of equal quality and functionality and in utilizing services and technology. Furthermore, Respondents are reminded that they must continue to utilize small, minority and women-owned businesses, consistent with current State law.

Utilizing New York State businesses in Agency contracts will help create more private sector jobs, rebuild New York's infrastructure, and maximize economic activity to the mutual benefit of the contractor and its New York State business partners. New York State businesses will promote the contractor's optimal performance under the contract award, thereby benefiting the public sector programs that are supported by associated procurements.

Public procurements can drive and improve the State's economic engine through promotion of the use of New York businesses by its contractors. The Agencies therefore expect the successful Respondent to provide maximum assistance to New York businesses in its use of the awarded contract. The potential participation of all kinds of New York businesses will deliver great value to the State and its taxpayers.

-REMAINDER OF PAGE LEFT BLANK INTENTIONALLY-

CONFIDENTIALITY PLEDGE

I, [_____], am an employee of [_____] doing business as [_____] with an office at [_____] (the “Employer”) and am not an employee of the New York State Housing Finance Agency, State of New York Mortgage Agency, or New York State Affordable Housing Corporation (individually, “Agency” and collectively, the “Agencies”).

In the course of my employment with Employer, I will perform certain official duties for the Agencies and have executed this Confidentiality Pledge (“Pledge”) as of this [____] day of _____, 2016 in order to induce the Agencies to allow me to access Data so that I may use such Data in the performance of my official duties for the Agencies while an employee of Employer.

“Data”, as used in this Pledge, means any and all records, data, or any other information not generally known to the public belonging to, generated by, provided to me by, or otherwise related to any Agency (whether in written, oral or electronic form), whether of a technical, business or other nature, that I may access, read, become aware of, or otherwise come into contact with in any way in the performance of my official duties for the Agencies or for Employer.

1. I will use the Data only as may be required for the performance of my official duties for the Agencies, and not for any other purpose.
2. I understand that applicable laws and regulations require the Agencies to safeguard the confidentiality of certain information contained in the Data.
3. I will exercise extreme caution to safeguard the confidentiality of the Data and will not release, reveal, publish, or permit the public to obtain access to any portion of the Data without the prior written consent of any of the Agencies.
4. I will exercise extreme caution to safeguard the confidentiality of any password that may be issued by any Agency. I will not permit any person, other than myself (including, but not limited to, any other employee of Employer), to use any such password at any time.
5. I will not attempt to copy any Data (other than as may be required for the performance of my official duties for the Agencies) nor will I create any record, public or private, from which any Data could be regenerated.

6. This pledge shall continue indefinitely and shall survive the termination of my employment with Employer and any date on which I may cease to perform any official duties for any Agency.

In addition, in the course of my employment with Employer, I will perform certain official duties for the Agencies (“Agencies’ Engagement”). I shall not accept any engagement in conflict with the Agency’s or Agencies’ interest in the subject matter of the Agencies’ Engagement.

I shall not offer to any employee, member or director of the Agency or Agencies’ any gift, whether in the form of money, service, loan, travel, entertainment, hospitality, thing or promise, or in any other form, under circumstances in which it could reasonably be inferred that the gift was intended to influence said employee, member or director, or could reasonably be expected to influence said employee, member or director, in the performance of the official duty of said employee, member or director or was intended as a reward for any official action on the part of said employee, member or director.

In witness whereof, I have executed this Pledge as of the date and year first above written.

[_____], SERVICER AND EMPLOYER

Signature

Printed Name

Phone Number

[_____], EMPLOYEE

Signature

Printed Name

Phone Number

Professional Temporary Staffing Consultant Descriptions (By Position)

Accounting Consultant Position Requirements

Certified Public Accountant:

- Bachelor's degree in accounting.
- Strong understanding of Generally Accepted Accounting Principles.
- CPA required, Big 4 experience preferred.
- Demonstrated ability to manage accounting functions and supervise personnel.
- Understanding of financial securities and investments, including mortgages and municipal bond financing.
- Must demonstrate ability to pay attention to detail, multi-task, prioritize, have strong oral and written communication skills and be able to work independently.
- Strong computer skills required (Microsoft Office).
- Experience using tier 1 ERP preferred.

Accountant:

- Bachelor's degree in accounting
- Approximately 5 to 10 years of related progressive experience (gov't or non-profit a plus).
- Demonstrated ability to manage accounting functions and personnel.
- Understanding of financial securities and investments.
- Successful candidate must demonstrate ability to pay attention to detail, multi-task, prioritize, have strong oral and written communication skills and be able to work independently.
- Strong computer skills required
- Knowledge of HFA's General Ledger system, the HFA Investment system, State's SFS system and agency software systems a plus. Experience using SAP and/or PeopleSoft a plus.

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

Underwriter Consultant Position Requirements

Underwriter

- Bachelor's degree.
- Master's degree in business administration, public administration, or city planning with concentration on real estate or public finance and/or experience in real estate and/or affordable housing preferred.
- Knowledge and/or experience in real estate and/or affordable housing.
- Minimum two to four years of employment experience depending on type of experience and level of education.
- Quantitative skills including expertise in Excel.
- Strong oral and written communication skills.

Senior Underwriter

- Bachelor's degree.
- Master's degree in business administration, public administration, or city planning with concentration in real estate, public finance, finance or equivalent experience.
- A strong background in appraisal analysis, tax credits, grant allocations, lending structures, credit judgment.
- Minimum three (3) years' experience in multi-family mortgage underwriting, affordable housing finance and/or other related experience.
- Excellent negotiation skills.
- Excellent oral and written communication skills.

Junior Underwriter

- Bachelor's degree.
- Master's degree in business or finance and/or knowledge and/or experience in real estate and/or affordable housing preferred.
- Knowledge and/or experience in real estate and/or affordable housing.
- Minimum one to three years of employment experience depending on type of experience and level of education.
- Quantitative skills including expertise in Excel.
- Strong oral and written communication skills.

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

Legal Consultant Position Requirements

Attorney:

- Admitted to the practice of law in New York State with three years of experience and in good standing with the State.
- Knowledge of structured financing, real estate, affordable housing, and/or municipal bonds
- Ability to establish effective working relationships with staff and outside attorneys and consultants.
- Ability to work under pressure.
- Excellent oral and written communication skills.
- Strong analytical and organizational skills.
- Record of productivity.

Senior Legal Assistant Analyst:

- Bachelor's degree as well as relevant academic training or transferrable skills.
- Excellent organizational and demonstrated analytical skills.
- Strong writing and proofreading skills.
- Must be able to multi-task and prioritize workload; ability to meet schedules and adapt to change.
- Ability to establish effective working relationships with staff, attorneys and outside contacts.
- Good typing, word processing, spreadsheet and other computer skills.
- Ability to be precise in making proper legal distinctions.
- Ability to work under pressure and be productive.
- Good attendance and punctuality.
- Qualification as a NYS Notary Public or ability to attain same.

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

Human Resource Consultant Requirements

Human Resource Assistant:

- Bachelor's Degree and/or related experience.
- Ability to work under pressure.
- Ability to work effectively with staff.
- Excellent interpersonal, organizational, and communication skills.
- Proficient in Microsoft Office with strong Excel.
- Confidentiality a must.

Human Resources Recruiter:

- Ability to work under pressure;
- Ability to work effectively with staff;
- Excellent organizational skills and communication skills;
- Excellent word processing skills;
- Two years in recruitment, Personnel/Human Resources related work a plus;
- Confidentiality a must.

-REMAINDER OF THIS PAGE LEFT BLANK INTENTIONALLY-

Cost Proposal Rates

**Staffing
Firm's
Name:** _____

TITLE	Contract Year 2016-2018 (Not to Exceed)		
	<u>Wage Rate*</u>	<u>Bill Rate*</u>	<u>Markup*</u>
Certified Public Accountant			
Accountant			
Junior Underwriter			
Senior Underwriter			
Underwriter			
Attorney			
Legal Assistant			
Human Resource Assistant			
Human Resource Recruiter			

*Hourly Rate or Range of Hourly Rates based upon experience.

Signature: _____ **Date:** _____

Cost Proposal Rates

Staffing Firm's Name: _____

TITLE	Contract Year 2019-2020 (Not to Exceed)		
	<u>Wage Rate*</u>	<u>Bill Rate*</u>	<u>Markup*</u>
Certified Public Accountant			
Accountant			
Junior Underwriter			
Senior Underwriter			
Underwriter			
Attorney			
Legal Assistant			
Human Resource Assistant			
Human Resource Recruiter			

*Hourly Rate or Range of Hourly Rates based upon experience.

Signature: _____ **Date:** _____

Cost Proposal Rates

**Staffing
Firm's
Name:** _____

TITLE	Permanent Placement Fee
	<u>Not To Exceed Amount</u>
Certified Public Accountant	
Accountant	
Junior Underwriter	
Senior Underwriter	
Underwriter	
Attorney	
Legal Assistant	
Human Resource Assistant	
Human Resource Recruiter	

Indicate instances where the permanent placement fee may be waived or reduced.

Signature: _____ **Date:** _____