

**REQUEST FOR PROPOSALS (RFP) NO. P260003**

**Banking Services**

for the

Bremerton Housing Authority (BHA)

TABLE OF CONTENTS		
Section	REQUEST FOR PROPOSALS Description	Page
1.0	RFP Information At-A-Glance	2
2.0	Introduction	2
3.0	Project Background	3
4.0	Scope of Work / Technical Specifications	3
5.0	Information to be Provided in Submittals	4
6.0	Proposal Submission	7
7.0	Proposal Evaluation	9
8.0	Interview	10
9.0	Contract Award	10
10.0	Insurance and License Requirements	11
11.0	Administrative Information	14

**ATTACHMENTS:**

- The majority of required attachments for return are electronically fillable.
- Please AVOID completing in handwriting to ensure legibility.
- Please sign hard copies in BLUE ink.

			Return	Read-only
Attachment A	<b>Form of Proposal</b>		<input checked="" type="checkbox"/>	
Attachment B	<b>Profile of Firm form</b>		<input checked="" type="checkbox"/>	
Attachment C	<b>OPTIONAL: Section 3 forms</b> , including explanation ( <i>applies to Section 3 employers ONLY</i> )		<input type="checkbox"/> <i>(optional)</i>	
Attachment D	<b>Form HUD-5369A</b> : Representations, Certifications & Other Statements of Bidders (11/1992)		<input checked="" type="checkbox"/>	
Attachment D-1	<b>Form HUD-5369B</b> Instructions to Offerors Non-Construction			<input checked="" type="checkbox"/>
Attachment E	<b>Form HUD-5370C PART 1</b> : General Conditions for Non-construction Contracts, Section 1 (with or without maintenance work) (01/2014)			<input checked="" type="checkbox"/>
Attachment F	<b>Sample Contract</b> , Professional Services, Non-Construction form (please note that this contract is being given as a <u>sample only</u> . BHA reserves the right to revise any clause herein and/or to include within the ensuing contract any additional clauses that BHA believes it is in its best intention to do so.)			<input checked="" type="checkbox"/>
Attachment G	<b>W-9</b> : Request for Taxpayer and Identification Number		<input checked="" type="checkbox"/>	
Attachment H	<b>HUD Depository Agreement Form</b>			<input checked="" type="checkbox"/>
Attachment I	<b>Proposed Pricing</b>		<input checked="" type="checkbox"/>	
Attachment J	<b>Scope of Services</b>			<input checked="" type="checkbox"/>

RFP Issued:	Questions Due:	Submittals Due:	Evaluation & Award	Desired Start:
04/10/2026, FRI	04/17/2026, FRI by 2:00 PM	05/08/2026, FRI by 2:00 PM	Week of 05/11/2026	06/01/2026

REQUEST FOR PROPOSALS (RFP) NO. P260003

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1.0 **RFP INFORMATION AT-A-GLANCE:**

<b>OBTAIN THE RFP AND ATTACHMENTS:</b>	<b>Click on:</b> <a href="https://ha.internationaleprocurement.com/">https://ha.internationaleprocurement.com/</a> Register with the <a href="#">Housing Agency Marketplace</a> system. Call (866) 526-9266 Toll Free Web Support for help with registering. RFP, Attachments and Addenda are posted on the <a href="#">Housing Agency Marketplace</a> system
<b>HOW TO ASK QUESTIONS:</b>  <i>No Phone Calls</i>	<b>04/17/2026 by 2:00 PM: DEADLINE</b> Any questions or requests for further information must be submitted in writing no later than the above date to the following contacts: <b>To: Tina Walgren, Contracts &amp; Procurement Administrator</b> Via email at: <a href="mailto:twalgren@bremertonhousing.org">twalgren@bremertonhousing.org</a> Via fax at: (360) 616-2905
<b>HOW TO SUBMIT A RESPONSIVE PROPOSAL:</b>	<b>1. You must be registered on the <a href="#">Housing Agency Marketplace</a> website to download the RFP, attachments and any addenda. Only those firms registered on the Housing Agency Marketplace website will be allowed to submit proposals.</b> <b>2. Submit your firm’s electronic proposal to the contact below.</b>
<b>ENSURE:</b>	<ul style="list-style-type: none"><li>▪ The person signing the proposal must be authorized to commit the proposer and to conduct negotiations or discussions if requested or required, or both.</li><li>▪ By completing, executing, and submitting the <i>Form of Proposal, Attachment A</i>, the “proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by BHA, either in hard copy or on the noted eProcurement System,” and agrees to sign BHA’s contract including the contract clauses (<a href="#">Attachments E and F</a>). (See <i>Section 9.0</i>)</li><li>▪ All information and Attachments required from proposers under the TABS in Section 5.0 must also be included for any major subconsultants (10% or more) or from any joint venture</li></ul>
<b>PROPOSAL SUBMITTAL DEADLINE:</b>	<b>05/08/2026, FRI by 2:00 PM: DEADLINE</b>
<b>PROPOSAL SUBMITTAL DELIVERY ADDRESS:</b>	<b>Email to <a href="mailto:twalgren@bremertonhousing.org">twalgren@bremertonhousing.org</a></b> <b>“RFP: P260003” should be included in the Subject Line</b>

2.0 **INTRODUCTION**

The Housing Authority of the City of Bremerton (BHA) was formed on July 17, 1940, under the authority of the State Housing Authorities Law (RCW 35.82) and the Housing Cooperation Law (RCW 35.83). BHA is governed by a six (6) member Board of Commissioners appointed by the Mayor of the City of Bremerton. BHA is a public corporation that contracts with the U.S. Department of Housing and Urban Development (HUD) to provide low rent public housing and administers a broad range of federally and locally financed housing programs including Section 8 assistance payments for the communities it serves.

**REQUEST FOR PROPOSALS (RFP) NO. P260003**

**Banking Services**

for the

Bremerton Housing Authority (BHA)

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BHA's total housing portfolio includes 650 units of housing at fifteen properties including public housing, project-based section 8, and low-income housing tax credit (LIHTC) units in multi-family developments and an assisted living facility. All of these properties are within the city limits of Bremerton. Of these properties, BHA owns seven and eight are separate tax credit partnership entities of which BHA is the General Partner. One of the BHA-owned properties is a Tax Credit Assistance Program (TCAP) project and is therefore subject to all of the requirements of a LIHTC partnership property. BHA is also the Project-Based Contract Administrator for the states of Washington, Nebraska, and Utah, BHA oversees 1,500 Section 8 vouchers for Kitsap and Mason Counties. BHA also formed a Type I supporting organization under IRC Section 509 (a)(3) to obtain funding to support facility and resident/participant needs.

**3.0 PROJECT BACKGROUND:**

**Overview:**

As a political subdivision of the State of Washington, BHA funds are classified as public deposits and may be deposited only in qualified public depository institutions approved by the Public Deposit Protection Commission (PDPC). The proposer must be a qualified public depository as defined in the Washington Public Deposit Protection Act (RCW 39.58) whose deposits are insured by the Federal Deposit Insurance Corporation (FDIC).

BHA maintains net assets of approximately \$70.7 million and a staff of approximately 115. For the 2026 fiscal year which began 10/01/2025, BHA has an approved operating budget of \$30 million excluding capital programs (\$342 thousand) and pass-through Housing Assistance Payments (\$277.2 million).

**4.0 SCOPE OF WORK (SOW) / TECHNICAL SPECIFICATIONS:**

Bremerton Housing Authority is soliciting proposals for a primary banking relationship with a Financial Institution or Firm which operates an office within the city limits of Bremerton. BHA will be contracting for the following general services for a four-year period beginning June 1, 2026, and ending May 30, 2030. At BHA's option, an extension, no longer than one year, will be permitted with the same terms and conditions of the original contract and as it is amended.

▪ Demand deposit checking accounts	▪ Investment sweep for checking/deposit accounts
▪ Overdraft protection	▪ Electronic funds transfer (ACH, Wires)
▪ Banking supplies	▪ Remote Deposits
▪ Credit Cards	▪ Positive Pay

While not required, BHA is also interested in trust and escrow agent services and investment, remote deposit services, credit card services, and safekeeping services as well.

BHA utilizes a check system, as opposed to warrants. BHA anticipates that proposed banking services will be compensated by the credit earned on average collected balances but is also willing to consider other options.

BHA is a public corporation that contracts with the US Department of Housing and Urban Development (HUD) under the terms of the contracts with HUD, BHA is required to select as depositories for its funds Financial Institutions whose deposits or accounts are insured by either the Federal Deposit Insurance Corporation or the National Credit Union Share Insurance Fund. HUD requires BHA to enter into General Depository Agreements with the Financial Institutions it utilizes for certain accounts as shown in **Attachment I**.

BHA is interested in internet services including but not limited to: account reconciliation, check image retrieval, account analysis, on-line transactions, and e-commerce. BHA will consider internet services available in the selection process but may elect to use none or any number of such services available.

REQUEST FOR PROPOSALS (RFP) NO. P260003

Banking Services

for the

Bremerton Housing Authority (BHA)

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Specific Services required are included in this Request for Proposal as **Attachment J**.

**4.1 Budget:**

BHA currently has an annual budget of approximately \$28,516 gross before earnings credits for these services; however, that does not mean BHA intends to spend the set aside in its entirety, nor is it opposed to reasonably expanding the budget should the BHA-selected options warrant it.

**4.2 Contract Period:**

BHA anticipates that it will initially award a contract for a period of approximately four (4) year(s) with the option, at BHA's discretion, of one (1) additional one (1) year option period **(+1/1)**.

**4.3 Current Contractor:**

BHA receives these services primarily from Kitsap Bank located in Bremerton, Washington. This firm was originally retained in 1995 and has subsequently been awarded additional service contracts following a formal procurement process.

**5.0 INFORMATION TO BE PROVIDED IN SUBMITTALS:**

**5.1 Tabbed Proposal Submittal:** BHA intends to retain the successful proposer pursuant to a "Best Value" basis not a "Low Bid" basis.

**5.2** For BHA to efficiently evaluate all responses, proposals must be put together in the order below, divided by the numbered tab.

Tab No.	Description
<b>TAB 1:</b>	<b>Attachments: Completed and Signed:</b> <b>A: Form of Proposal</b> <b>B: Profile of Firm</b> <b>D: HUD Form 5369-A</b> <b>H: W-9 Request for Taxpayer and Identification Number</b> <b>-- License Copy: State of Washington with endorsement for the City of Bremerton → See <a href="#">Section 10.2</a></b>
<b>TAB 2:</b>	<b>Proposed Pricing:</b> <b>A)</b> Insert <b>Attachment I</b> with Proposed Pricing. Pricing form must be executed by an official of the firm who is in a position to commit the organization to provide the services in accordance with the Proposed Pricing Schedule. <b>B)</b> The proposed pricing is to be <b>all-inclusive of related costs</b> that the successful proposer will incur to provide the noted services including, but not limited to, the following: employee wages and benefits; clerical support; overhead; profit; sales tax; licensing; insurance; tools; equipment; long distance telephone calls; document copying; etc. <b>C)</b> Costs not included on the proposed fee structure, but which the financial institution/firm proposes to charge, must be individually itemized and thoroughly explained.

# REQUEST FOR PROPOSALS (RFP) NO. P260003

## Banking Services

for the

Bremerton Housing Authority (BHA)

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### **TAB 3: Project Approach:**

#### **Conversion Period**

1. Describe the conversion plan you would coordinate to ensure a smooth transition from the current provider.

#### **Ongoing Operation**

1. Describe the effective rate, method used and formula proposed to calculate the service charge credit for collected fund balances. Describe the interval/time frame proposed to pay any additional fees not offset by service charge credit (i.e. monthly, quarterly, semi-annually, annually) and to what extent the service charge credit/debit from one period can be carried forward to the next period.
2. Identify the proposed compensation method (i.e. compensating balances, straight fees, other method or combination thereof).
3. Describe the mechanism and fee for handling possible overdraft situations and identify a line of credit/overdraft interest charge formula and when it will be applicable. Describe what constitutes daylight and overnight overdraft situations.
4. Discuss any special conditions, other fees, other services, or deviations from the bid specifications.
5. Please describe the availability, date rate available, and data download/file transfer format of the following internet services. Identify any costs related to such internet services on **Attachment I**. BHA will consider the internet services availability in its selection of banking services but may choose to use none or any of available services.
  - i. Account Administration
    - o Ability to view and download transaction details of all BHA accounts
    - o Ability to view and print cancelled checks, deposit slips and/or other debit/credit documents scanned
    - o Ability to view and print debit/credit activities in merchant services and credit card transactions
    - o Ability to transfer/upload files for positive pay
    - o Ability to transfer/upload files for payroll direct deposits
    - o Ability to receive account reconciliations and analysis data on-line
    - o Ability to retrieve and download current and prior period monthly statements on-line; however, BHA would want a paper statement as well.
  - ii. Initiate Online Banking Transactions
    - o Fund Transfers – ACH, Wires
    - o Stop Payment
    - o Payments to Credit Card accounts from checking accounts
    - o Transfers between funds
    - o Transfer funds to accounts at other banks
6. Provide specifications for automated service hardware and software capability proposed (i.e., wire transfers, ACH debit/credit, daily balance reporting, etc.).
7. Provide a funds availability schedule. Describe one-day and two-day availability and wire requirements.

#### **Emergency and Disaster Preparedness**

1. Describe your emergency preparedness and disaster recovery procedures. How quickly will backup facilities be activated?

**REQUEST FOR PROPOSALS (RFP) NO. P260003**  
**Banking Services**  
for the  
Bremerton Housing Authority (BHA)

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**TAB 4: Capacity and Capability to Perform the Work Described in the SOW:**

- A) Names of individuals assigned to this project and their areas of responsibilities.
  - B) Specific experience of the assigned individuals relative to the RFP requirements.
  - C) Resumes for all of the firm's principals.
  - D) Identify any sub-consultants that will be used.
- 

**TAB 5: Successful Past Performance:**

- A) Submit a listing of five (5) current and past clients, including Public Housing Authorities and/or public entities for which your firm has performed similar services to this RFP.
    - Include the client firm or company name;
    - The name of the firm's contact person;
    - Client's telephone number;
    - Brief description of services performed and approximate date they were performed.
- 

**TAB 6: Reports and Additional Information:**

Provide the following reports and information about your institution:

- Community Reinvestment Act (CRA) rating/policy
  - On-line reporting sample reports
  - Analysis & bank statements
  - Safekeeping statement and receipts
  - Most recent financial statement
  - SEC and/or Moody's credit rating or comparable rating
- 

**TAB 7: Contact Information:**

Provide your institution's contact name and phone number for each of the following areas: general banking services, safekeeping services, wire transfer services, ACH Direct Deposit, and local office/branch contact. It is BHA's preference to have one contact person who will deal with other representatives at the institution to resolve any questions or concerns.

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**TAB 8: Equal Employment Opportunity (EEO)**

**REQUEST FOR PROPOSALS (RFP) NO. P260003**  
**Banking Services**  
for the  
Bremerton Housing Authority (BHA)

---

- A) Proposers shall submit under this tab a copy of its EEO Policy and any documentation it believes substantiates the proposer's practice and history of employing minorities and/or women in professional positions.
- 

**TAB 9: (Optional): Subconsultant/Joint Venture Information**

- A) Proposers shall identify hereunder whether or not he/she intends to use any subconsultants for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from proposers under the preceding tabs must also be included for any major subconsultants (10% or more) or from any joint venture.
- 

**TAB 10: (Optional): Section 3 Business Preference Documentation**

- A) For any proposer claiming a Section 3 Business Preference, he/she shall under this tab include the fully completed and executed Section 3 Business Preference Certification Form attached hereto as [Attachment C](#) and any documentation required by that form.
- 

**TAB 11: (Optional): Other Information**

- A) The proposer may include hereunder any other general information that they believe is appropriate to assist BHA with its evaluation.
- 

- 5.3 If no information is being placed under any of the tabs, please insert a statement that says, "THIS TAB LEFT INTENTIONALLY BLANK." DO NOT eliminate any of the tabs.
- 5.4 Effort should be made to keep submittals concise.
- 5.5 The person signing the proposal must be authorized to commit the responder and to conduct negotiations or discussions if requested or required, or both.
- 5.6 None of the proposed services may conflict with any requirement BHA has published herein or has issued by addendum.
- 5.7 Omission of any of the aforementioned documents or certifications will render the proposal non-responsive.

**6.0 PROPOSAL SUBMISSION:**

**Bid Pricing:**

**Attachment I:** Complete, sign, and insert "Proposed Pricing" after Tab 2. Unless otherwise stated, the proposed pricing is to be **all-inclusive of related costs** that the successful proposer will incur to provide the noted services including, but not limited to the following: employee wages and benefits; clerical support; overhead; profit; sales tax; licensing; insurance; tools; equipment; long distance telephone calls; document copying; etc.

# REQUEST FOR PROPOSALS (RFP) NO. P260003

## Banking Services

for the

Bremerton Housing Authority (BHA)

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- 6.1.1 Sales Tax:** As per RCW 35.82.210, housing authorities are exempt from taxes including sales tax. BHA will exclude any tax amounts from payment that are noted on any billings.
- 6.1.1.1 Labor:** Sales or use tax is not imposed on the purchases by the Consultant or sub(s) of labor or services in the performance of the contract to be executed based on the solicitation this contract is awarded from. Therefore, the Washington State retail sales tax or the compensatory use tax for these items should **not** be included in any invoice billings and BHA will exclude any tax amounts from payment that are noted on any billings.
- 6.1.1.2 Material:** All materials purchased by the Contractor in the performance of the work of the contract to be awarded based on this solicitation **are** subject to Washington State Use Tax (unless retail sales tax has been paid on the materials). When determining a contract bid to the Owner, the cost of materials, and the tax on said materials must be included in the total contract amount submitted for review and selection. Contract billings presented for payment to the Owner may include applicable retail, use or excise taxes paid by the Consultant in the cost of materials, but must not have any such tax itemized on the invoice.
- 6.2 Quantities:** All quantities entered above and on the Housing Agency Marketplace website for calculating purposes only to allow BHA to compare the respondents “apples to apples”. **BHA does not guarantee any minimum or maximum amount of work as a result of any award ensuing from this RFP.** BHA reserves the right to award work, on a task order basis, in any amount of services or items that BHA requires.
- 6.3 Submission Conditions:** Do not alter the attachments or proposal requirements in any way unless you have received written approval from BHA.
- 6.3.1** By accessing the [Housing Agency Marketplace](#) internet site, registering and downloading these documents, each prospective proposer that does so is thereby agreeing to confirm all notices that BHA delivers to him/her as instructed, and by submitting a proposal, the proposer is thereby agreeing to abide by all terms and conditions published herein and by addendum pertaining to this RFP.
- 6.4 Submission Responsibilities:** It is each proposer’s responsibility to be aware of and to abide by all dates, times, conditions, requirements, and specifications set forth within all applicable documents issued by BHA, including the RFP, Attachments, and any addenda. By virtue of completing, signing, and submitting the completed documents, the proposer is stating his/her agreement to comply with all the conditions and requirements set forth within those documents.
- 6.5 Proposer’s Responsibilities-Contact with BHA:** It is the responsibility of the proposer to address all communication and correspondence pertaining to this RFP process to the contacts specified on [page 2](#). Proposers must not make inquiry or communicate with any other staff member or official (including members of the Board of Commissioners) pertaining to this RFP. Failure to abide by this requirement may be cause for BHA to disqualify a submittal from consideration.
- 6.6 Addenda:** All questions and requests for information must be received in writing to the BHA representative as directed on [page 2](#). Responses to all such inquiries will be in writing via the Q & A section on the [Housing Agency Marketplace](#) site which is automatically distributed to all registered (member) prospective proposers. During the RFP solicitation process, BHA will not conduct any *ex parte* conversations (a substantive conversation - “substantive” meaning, when decisions pertaining to the RFQ are made - between BHA and a prospective proposer when other prospective proposers are not present) that may give one prospective proposer an advantage over other prospective proposers.

**REQUEST FOR PROPOSALS (RFP) NO. P260003**

**Banking Services**

for the

Bremerton Housing Authority (BHA)

---

**7.0 PROPOSAL EVALUATION:**

**7.1 Evaluation Factors:** The following factors will be utilized by BHA to evaluate each proposal submittal received. Award of points for each listed factor will be based upon the documentation that the proposer submits within his/her proposal submittal.

No.	Evaluation Factors	Factor Type	Max Point Value
1	Reasonableness and Competitiveness of Proposed Pricing and Other Costs	Objective	20
2	Responsiveness of the written proposal for the purpose and scope of service	Subjective (Technical)	20
3	Ability to provide designated and responsive bank personnel at the local level in support of BHA banking needs and treasury operations	Subjective (Technical)	30
4	Ability and history of successfully completing contracts of this type and ability to execute transactions and to carry out efficient and effective operations in an automated environment to support BHA's current and future banking needs	Subjective (Technical)	30
<b>Maximum Points</b>			<b>100</b>

**7.1 Evaluation Method:**

- 7.1.1 Submittal Receipt:** All submittals received by the stated deadline will be opened by BHA's CO or his/her designee and initially be screened for eligibility.
- 7.1.2 Evaluation Committee:** BHA shall select a minimum of a three-person committee to evaluate each of the responsive proposals submitted in response to this RFP. The committee will be made up of BHA staff and other experienced persons, if needed.
- 7.1.3 Restrictions:** All persons having familial (including in-laws) and/or employment relationships (past or current) with principals and/or employees of a proposer entity will be excluded from participation on the BHA evaluation committee. Similarly, all persons having ownership interest in and/or contract with a proposer entity will be excluded from participation on the BHA evaluation committee.
- 7.1.4 PLEASE REMEMBER:** No proposer shall be informed at any time during or after the RFP process as to the identity of any evaluation committee member. If, by chance, a proposer does become aware of such, he/she SHALL NOT make any attempt to contact or discuss with such person anything related to this RFP. The BHA contacts noted on [page 2](#) are the only individuals at BHA that the proposers shall contact after the RFP has closed. Failure to abide by this requirement may (and most likely will) cause such proposer to be eliminated from consideration for award.
- 7.1.5 Evaluation:** The appointed evaluation committee will evaluate the responsive proposals and award points based on the Evaluation Factors. Upon completing the evaluation process, the committee will forward the completed evaluations back to the BHA CO.
- 7.1.6 Determination of Top-ranked Proposer:** The points awarded by the evaluation committee will be tallied to determine the final rankings and then forwarded to the BHA Executive Director for approval.

# REQUEST FOR PROPOSALS (RFP) NO. P260003

## Banking Services

for the

Bremerton Housing Authority (BHA)

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- 7.1.7 Interviews may then be conducted with the top-ranked respondents.
- 7.1.8 BHA reserves the right to conduct negotiations with one or more respondents if, in the sole opinion of BHA, that method will provide the greatest benefit to BHA.
- 7.1.9 **Notice of Award:** If an award is made, notification of the announcement of the awarded firm shall be sent to all proposers via e-mail.
- 7.1.10 **Minimum Evaluation Results:** To be considered to receive a contract award, a proposer must receive a total calculated average of at least 70 points (of the 115 total possible points detailed within the evaluation section of this RFP). This total does not include the additional Interview Points detailed below.)

### 8.0 INTERVIEW Additional 50 Points

- 8.1 After scoring the proposals, the evaluation selection committee *may* select a short-list of the most highly qualified respondents to interview. Prior to the interview, references will be checked by the evaluation selection committee. Interview questions will be directed solely to the proposed Project Team. The corporate executive dedicated to the project and all other personnel which may be a part of the winning firm or team's Project Team are all required to attend. In addition to presenting their qualifications, experience, and approach to the project, the Project Team will be expected to respond to questions from the evaluation selection committee regarding the proposal as well as additional questions that might have been posed in the notification letter to the respondent.

### 9.0 CONTRACT AWARD:

- 9.1 **Contract Award Procedure:** If a contract is awarded from this RFP, the following detailed procedures will be followed:
  - 9.1.1 It is anticipated that upon final completion of the proposal evaluation process, the evaluation committee will forward the completed evaluations to the CO. The CO will compile and forward to the ED for approval a written award recommendation. The ED will review the recommendation and, if in agreement, approve contract negotiations to begin with the awarded company. At the ED's discretion, the recommendation to award may also be presented to BHA's board of commissioners for final approval.
- 9.2 **Contract Conditions:** **IMPORTANT: Please review.** The following provisions are considered mandatory conditions of any contract award made by BHA pursuant to this RFP:
  - 9.2.1 **Contract Form:** BHA will not execute a contract on the successful proposer's form as HUD requires several specifically worded contract clauses. BHA has incorporated those requirements in addition to BHA's insurance company coverage requirements onto its contract form. No modifications to the required HUD contract attachments may be negotiated without written approval from HUD provided by the prospective proposer making the request. ([Attachments E and F](#)).
  - 9.2.2 **Amending Contract Clauses:** BHA may consider 1) additional clauses 2) removing clauses (due to inapplicability) 3) amending an existing clause and/or 4) including an additional attachment (*provided by the prospective proposer*) the proposer desires.
  - 9.2.3 **Request Process:**
    - 9.2.3.1 It is the responsibility of each prospective proposer to notify BHA, in writing, no later than deadline for Q & As noted on page 2 of this RFP of any contract clause that he/she is not willing to include and abide by in the final executed contract. BHA will consider and respond to such written correspondence. Submit requests via email to:

Tina Walgren

# REQUEST FOR PROPOSALS (RFP) NO. P260003

## Banking Services

for the

Bremerton Housing Authority (BHA)

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### Contract & Procurement Administrator

[twalgren@bremertonhousing.org](mailto:twalgren@bremertonhousing.org)

**9.2.3.2** The decision of BHA to exclude such clauses does not give the successful proposer the right to refuse to execute BHA's contract form. If the prospective proposer is not willing to abide by BHA's response/decision, then that prospective proposer shall be deemed ineligible to submit a proposal.

**9.2.3.3** Contract clause requests, concerns, clarifications, etc. will only be accepted during the open solicitation period. Accordingly, BHA has no responsibility to conduct any negotiations after the submittal deadline pertaining to the contract clauses already published. **Delays or refusal to execute BHA's contract upon contract award is not conducive to the SOW waiting to be performed.**

**9.2.3.4** By completing, executing, and submitting the *Form of Proposal*, [Attachment A](#), the "proposer is thereby agreeing to abide by all terms and conditions pertaining to this RFP as issued by BHA, either in hard copy or on the noted eProcurement System," and agrees to sign BHA's contract attached as [Attachments E](#) and [F](#).

**9.2.4** **Assignment of Personnel:** BHA shall retain the right to demand and receive a change in personnel assigned to the work if BHA believes that such change is in the best interest of BHA and the completion of the contracted work.

**9.2.5** **Subconsultants:** The successful proposer shall not assign any rights, nor delegate any duty for the work proposed pursuant to this RFP (including, but not limited to, selling or transferring the contract) without the prior written consent of the CO. Any purported assignment of interest or delegation of duty without the prior written consent of the CO shall be void and may result in the cancellation of the contract with BHA or may result in the full or partial forfeiture of funds paid to the successful proposer as a result of the proposed contract; either as determined by the CO or the ED.

**9.2.6** **Right to Negotiate Final Fees:** BHA shall retain the right to negotiate the amount of fees that are paid to the successful proposer, meaning the fees proposed by the top-rated proposer may, at BHA's option, be the basis for the beginning of negotiations. Such negotiations shall begin after the evaluation panel has chosen a top-rated proposal. If such negotiations are not, in the opinion of the CO and/or ED successfully concluded within five (5) business days, BHA shall retain the right to end such negotiations and begin negotiations with the next top-rated proposer. BHA shall also retain the right to negotiate with and make an award to more than one proposer, as long as such negotiation(s) and/or award(s) are addressed in the above manner (i.e. top-rated first, then next-rated following until a successful negotiation is reached).

**9.2.7** **Contract Service Standards:** All work performed pursuant to this RFP must conform and comply with all applicable local, state, and federal codes, statutes, laws, and regulations.

## **10.0 INSURANCE & LICENSING REQUIREMENTS:**

### **10.1 Required Insurance Coverage:**

**10.1.1** Minimum Scope of Insurance: **Coverage shall be at least as broad as:**

**REQUEST FOR PROPOSALS (RFP) NO. P260003**

**Banking Services**

for the

Bremerton Housing Authority (BHA)

---

1. Insurance Services Office Commercial General Liability coverage (*occurrence form CG 0 01 10 01*)
2. Insurance Services Office Additional Insured form (*CG 20 37 or CG 20 26*)
3. Insurance Services Office form number CA 00 01 06 92 covering Automobile Liability Code 1 (*any auto*)
4. Workers' Compensation insurance as required by state law and Employer's Liability Insurance

**10.1.2 Minimum Limits of Insurance: Consultant shall maintain limits no less than as follows.**

**General Liability:**

- \$1 million per occurrence for Bodily Injury, Personal injury, and Property Damage. If Commercial General Liability Insurance or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to the project/location or the general aggregate limit shall be twice the required occurrence limit.

**Workers' Compensation (*statutory*) and Employer's Liability:**

- \$1 million per accident for Bodily Injury or Disease.

Errors and Omissions Insurance including coverage for claims arising from wrongful acts under the Americans with Disabilities Act.

Fidelity Insurance including Employee Dishonesty on a blanket basis.

**Note:** These limits can be attained by individual policies or by combining primary and umbrella policies.

**10.1.3 Deductibles and Self-Insured Retentions:** Any deductibles or self-insured retentions must be declared to and approved by BHA. At the option of BHA, either: the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects BHA, its officers, officials, employees, and volunteers; or the Consultant shall provide a financial guarantee satisfactory to BHA guaranteeing payment of losses and related investigations, claim administration, and defense expenses.

**10.1.4 Other Insurance Provisions:** General Liability and Automobile Liability policies are to contain, or be endorsed to contain, the following provisions:

## REQUEST FOR PROPOSALS (RFP) NO. P260003

### Banking Services

for the

Bremerton Housing Authority (BHA)

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1. BHA, its officers, employees, and volunteers are to be covered as additional insured with respect to liability arising from services provided by the Consultant including bodily injury or equipment furnished; or arising out of automobiles owned, leased, hired or borrowed by or on behalf of the Consultant. General Liability coverage can be provided in the form of an appropriate Endorsement to the Consultant's insurance or as a separate policy for services of this contract.
2. For any claims related to this contract, the Consultant's insurance coverage shall be primary insurance as respects BHA, its officers, employees, and volunteers. Any insurance or self-insurance maintained by BHA, its officers, employees or volunteers shall be in excess of the Consultant's insurance unless such claims are caused by the sole negligence, errors or omissions of BHA.
3. Each insurance policy required by these specifications shall be endorsed to state that coverage shall not be cancelled or materially changed, except after 30 days prior written notice by certified mail, return receipt requested, has been given to BHA.
4. Maintenance of the proper insurance for the duration of this contract is a material element of the contract. Material changes in the required coverage or cancellation shall constitute material breach of the contract by the Consultant.

**10.1.5 Acceptability of Insurers:** Insurance shall be placed with insurers with a current A.M. Best's or equivalent rating of no less than B+:VI.

**10.1.6 Verification of Coverage:**

**10.1.6.1 Consultant:** Consultant shall furnish BHA with original Certificates of Insurance together with amendatory Endorsements effecting coverage required by these specifications. The Endorsements shall conform fully to the requirements. All Certificates of Insurance and Endorsements are to be received and approved by BHA in sufficient time prior to work commencing to permit the Consultant to remedy any deficiencies. BHA reserves the right to require complete, certified copies of all required insurance policies, including Endorsements effecting the coverage required by these specifications at any time.

**10.1.7 Subconsultants:** The use of subconsultants must be approved by BHA. Consultant shall include all subconsultants as insureds under their policies or shall furnish separate insurance certificates and endorsements for each subconsultant in a manner and in such time as to permit BHA to approve them before subconsultants' work begins. All coverage for subconsultants shall be subject to the requirements stated above.

**10.1.8** Notwithstanding this provision, the Consultant shall indemnify BHA for any claims resulting from the performance or non-performance of the Consultant's subconsultants and/or their failure to be properly insured.

**10.2 Licensing Requirements:** Copies of the following license(s) shall be provided under [TAB 1](#).

**10.2.1 State of Washington Master Business or Legal Entity License:**

A copy of the proposer's license issued by the State of Washington Secretary of State allowing the proposer to provide the services in the state of Washington. The

# REQUEST FOR PROPOSALS (RFP) NO. P260003

## Banking Services

for the

Bremerton Housing Authority (BHA)

---

WA State business license must have the required endorsement for the City of Bremerton.

### 11.0 **ADMINISTRATIVE INFORMATION**

#### 11.1 **BHA'S Reservation of Rights:**

- 11.1.1 While HUD Handbook No. 7460.8 REV 3 is not law, it is intended to and will serve as guidance for BHA's procurement activities as required for federally assisted projects.
  - 11.1.2 BHA reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by BHA to be in its best interests.
  - 11.1.3 BHA reserves the right not to award any contracts pursuant to this RFP.
  - 11.1.4 BHA reserves the right to terminate a contract awarded pursuant to this RFP, at any time for its convenience upon ten (10) days written notice to the successful proposer(s).
  - 11.1.5 BHA reserves the right to determine the days, hours and locations that the successful proposer(s) shall provide the services called for in this RFP.
  - 11.1.6 BHA reserves the right to retain all proposals submitted and not permit withdrawal for a period of 60 days subsequent to the deadline for receiving proposals without the written consent of the BHA CO.
  - 11.1.7 BHA reserves the right to negotiate the fees proposed by the proposer entity.
  - 11.1.8 BHA reserves the right to reject and not consider any proposal that does not meet the requirements of this RFP, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services.
  - 11.1.9 BHA shall have no obligation to compensate any proposer for any costs incurred in responding to this RFP.
  - 11.1.10 BHA shall reserve the right to, at any time during the RFP or contract process, prohibit any further participation by a proposer or reject any proposal submitted that does not conform to any of the requirements detailed herein. By accessing the [Housing Agency Marketplace](#) internet site and downloading this document, each prospective proposer thereby agrees to abide by all terms and conditions listed within this document and within the noted internet site.
  - 11.1.11 BHA reserves the right to review and inspect the awarded contractor's activities throughout the contract term.
- 11.2 **Equal Opportunity Employment:** BHA will not discriminate on the basis of race, color, gender, sexual preference, religion, age, disability, national origin, marital or familial status, or any other legally protected status.
- 11.3 **Minority-owned and Women-owned Business Enterprises:** BHA strongly encourages responses from Minority, Women and Disadvantaged Business Enterprises (M/W/DBE) or partnerships made up of M/W/DBEs as it is BHA's goal to increase that contract base. A respondent who is a M/W/DBE or who has plans to use a M/W/DBE as a subconsultant or partner in the response and that subconsultant or partner has *not* been certified as a M/W/DBE, the subconsultant or partner shall submit a certified application for such M/W/DBE to the appropriate local or state agency.
- 11.4 **Section 3 Requirements:** Section 3 of the Housing and Urban Development Act of 1968 (hereinafter "S3") requires BHA to the greatest extent feasible to provide employment opportunities to S3 residents. S3 residents include residents of BHA communities and other low-

# REQUEST FOR PROPOSALS (RFP) NO. P260003

## Banking Services

for the

Bremerton Housing Authority (BHA)

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income residents of Bremerton. Proposers wishing to claim a Section 3 preference should refer to [Attachment C](#) for instructions.

- 11.5 Basic Eligibility:** The successful respondent must be licensed to do business in the State of Washington and must have a state Unified Business Identifier (UBI) number. In addition, they must not be debarred, suspended, or otherwise ineligible to contract with BHA, and must not be included on the General Services Administration's "List of Parties Excluded From Federal Procurement and Non-procurement Programs" or HUD's "Limited Denial of Participation" list.
- 11.6 Payment Requirements:** Respondents should be aware that BHA will only make payments on the contract issued under this RFP after the work being billed has been completed and will pay reimbursable expenses (if applicable to the particular contract) to the respondent only upon receipt of an invoice for the reimbursable expenses. *No advance payments will be made* to the selected respondent, who must have the capacity to meet all project expenses in advance of payments by BHA.
- 11.7 Documents Produced:** All construction drawings, reports, specifications, and other documents produced under contract to BHA must be submitted to BHA in both hard copy and a digital format that meets BHA's requirements, using Microsoft Office or AutoCad products in an IBM-compatible format. All documents and products created by the awarded firm and their subconsultant(s) shall become the exclusive property of BHA.
- 11.8 Other Contracts:** During the original term and all subsequent renewal terms of the contract resulting from this RFP, BHA expressly reserves the right, through any other sources available, to pursue and implement alternative means of soliciting similar or related services as described in this RFP. BHA may award contracts to other vendors such as designers, consultants, or contractors.
- 11.9 Funding Availability:** By responding to this RFP, the respondent acknowledges that, for any contract signed as a result of this RFP, the authority to proceed with the work is contingent upon the availability of funding.

**11.10 Acronyms:**

<b>A.M. Best</b>	Alfred M. Best ( <i>founder</i> ) Insurance Rating Guide
<b>BHA</b>	Housing Authority of the City of Bremerton
<b>CO</b>	Contract Officer
<b>HUD</b>	(U.S. Department of) Housing and Urban Development
<b>PBCA</b>	Performance Based Contract Administrator
<b>RFP</b>	Request for Proposal
<b>SOW</b>	Scope of Work