



## **Montgomery Housing Authority**

**525 South Lawrence Street  
Montgomery, Alabama 36104**

### **REQUEST FOR PROPOSAL (RFP) 2019-07**

#### **MARKETING SERVICES**

**DATE ISSUED:** **Monday, June 17, 2019**

**TYPE OF PROJECT:** The Montgomery Housing Authority (MHA) is seeking proposals from qualified firm(s)/individual(s) to perform marketing services.

**CONTACT PERSON:** Joeretta Smith, Procurement and Contracts Administrator  
[jsmith@mhatoday.org](mailto:jsmith@mhatoday.org)

**LAST DAY FOR QUESTIONS:** **Wednesday, July 3, 2019 at 3:00 p.m. (CST)**

**SUBMISSION DEADLINE:** **Wednesday, July 10, 2019 at 3:00 p.m. (CST)**

**SUBMISSION ADDRESS:** Joeretta Smith, Procurement and Contracts Administrator  
Montgomery Housing Authority  
525 South Lawrence Street  
Montgomery, Alabama 36104

**Separate sealed proposals will be accepted at the MHA's, Procurement/Contract Office, 525 South Lawrence Street, Montgomery, Alabama 36104, until the date and time noted above. Proposals will be held in confidence and not released in any manner until after contract award.**

The responsibility for submitting a response to this RFP at the MHA on or before the stated time and date will be solely and strictly the responsibility of the respondent. The offeror shall wholly absorb all costs incurred in the preparation and presentation of the proposal.

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## **PART I – GENERAL INFORMATION**

### **1.1 Introduction**

MHA is soliciting proposals from qualified providers, to develop marketing materials for the agency, to include all sites owned and operated by the housing authority. MHA recognizes that portfolio growth, shifting consumer behaviors and evolving demographics demands a more sophisticated approach to marketing practices. Desired marketing products include, but are not limited to a video, aerial photos and glossy pamphlets/brochures. MHA anticipates that it will initially award a contract for a period of two (2) years with the option, at the MHA’s discretion, to renew for two (3) additional years.

### **1.2 Method of Solicitation**

MHA is soliciting competitive proposals from qualified firms with a documented record of accomplishments of providing the required services, preferably for public housing authorities or other agencies through a formal RFP process.

### **1.3 Obtain Copies of this Solicitation**

Single copies of the RFP package may be obtained, at no cost by:

1. Visiting the MHA’s website at: [www.mhatoday.org](http://www.mhatoday.org)
2. Requesting via email to [jsmith@mhatoday.org](mailto:jsmith@mhatoday.org)
3. Copies may also be picked up in person at:

Montgomery Housing Authority  
Procurement/Contract Office  
525 South Lawrence Street  
Montgomery, Alabama 36104

Persons wishing to be emailed or faxed copies of the RFP may submit their request via email to: [jsmith@mhatoday.org](mailto:jsmith@mhatoday.org).

## **PART II – INSTRUCTIONS FOR SUBMITTING PROPOSALS**

### **2.1 Submission of Proposals**

Respondents should submit **one (1) original and three (3) copies** of their proposal, dated and signed by an authorized official of the company. Proposals must be submitted in a *sealed envelope* that shows the firm’s name and address, and **clearly** written on the outside of the sealed envelope must be the words “**Virtual Private Network (VPN) Management – (RFP 2019-04) - Wednesday, June 5, 2019 at 3:00 p.m. (CST)**”.

Proposals received after the deadline date and time may be determined unacceptable. Refer to form **HUD 5369-B, Section 6**, regarding late submissions and withdrawals.

All proposals must be submitted in accordance with the conditions and instructions provided herein and must remain open for acceptance for one hundred and eighty (180) days from the due date. Proposals should demonstrate detailed plans on how the Respondent intends to provide the required services in a manner that will result in the successful and timely completion of the service(s). In addition, the proposal should demonstrate the Respondent’s capacity and readiness to perform the

Scope of Services immediately upon execution of a contract with MHA. Finally, the proposal should include evidence of the Respondent's previous experience and qualifications, relative to the provision of such services.

## **2.2 Interpretation/Questions**

During the period between issuance of this RFP and the proposal due date, no oral interpretation of the RFP's requirements will be given to any prospective respondent. Requests for interpretation must be made, in writing, at least ten (10) days before the submission due date and time to: Email: [jsmith@mhatoday.org](mailto:jsmith@mhatoday.org).

## **2.3 Addendum and Update Procedures for the RFP**

During the period of advertisement for this RFP, MHA may wish to amend, add to, or delete from, the contents of this RFP. In such situations, MHA will issue an addendum to the RFP setting forth the nature of the modification(s). MHA will email (or send via regular postal mail or fax upon written request) any addenda to Respondents of this RFP solicitation. Interested parties may also view addenda on MHA's website [www.mhatoday.org](http://www.mhatoday.org). It shall be the responsibility of each Respondent to ensure they have any/all additional addenda relative to this RFP.

## **2.4 Proposal Format**

All proposals shall be submitted in 8 ½ x 11-inch format, preferably in three (3) ring binders. Larger size pages or inserts may be used, provided they fold into 8 ½ x 11 inches. All copies of the submittal must be identical in content and organization. The format of the respondent's proposal should be structured the same as the format of the RFP. Proposals should be organized into sections and tabbed for ease of review. Respondents must provide a comprehensive Table of Contents at the front of the proposal. The proposal also must be organized in response to the Submission Requirements. The front cover of the proposal should bear the name and number of the RFP, the date, and the Respondent's name, address, phone number and email address.

## **2.5 Submittal Forms**

Provided, as a part of the proposal, all required certifications and HUD forms, licenses and proof of insurance. All forms that require a signature or initials must bear an original initial or signature.

## **2.6 Acceptance of Proposals**

Proposals must be signed, sealed, and received in completed form at MHA, no later than the proposal closing date and time. Proposals submitted after the designated closing date and time will not be accepted for any reason and will be returned unopened to the originator.

MHA reserves the right to accept or reject any or all proposals, to take exception to these RFP specifications or to waive any formalities. Respondents may be excluded from further considerations for failure to comply with the specifications of this RFP.

MHA reserves the right to reject the proposal of Respondents, who have previously failed to perform properly or to complete on time, a contract of similar nature. MHA also reserve the right to reject proposals of Respondents who habitually, without just cause, neglect the payment of bills or disregard their obligations to subcontractors, providers of materials, or employees.

## **2.7 Time for Reviewing Proposals**

Proposals received prior to the closing date and time will be securely kept, unopened until the closing date and time. Proposals received after the closing date and time may not be considered. MHA's Evaluation Committee, appointed by the Executive Director, will evaluate all proposals properly received.

The Evaluation Committee will analyze proposals within the 180 days of the date and time due and make a recommendation for award of contract or not to award, to the MHA Executive Director.

## **2.8 Withdrawal of Proposals**

Proposal may be withdrawn by written notice received any time before the contract award. Proposals may be withdrawn in person by Respondent or its authorized representative if the identity of such representative is established and a signed receipt of the withdrawn proposal is received by MHA prior to the contract award.

## **2.9 Award of Contract**

Contract shall be awarded to the Respondent submitting a proposal according to the evaluation criteria contained herein, provided the proposal is in the best interest of MHA. The Respondent to whom the award is made will be notified at the earliest practical date.

## **2.10 HUD Debarment and Suspension List**

The Respondents and all subcontractors' names or businesses must not appear on the HUD's Debarment and Suspension list.

## **2.11 Certification of Legal Entity**

Prior to execution of the contract agreement, the Respondent shall certify that joint ventures, partnerships, team agreements, new corporations, or other entities that either exist or will be formally structured are, or will be, legal and binding under the Alabama State Law and the City of Montgomery, Alabama.

## **2.12 Cost Borne by Respondent**

All cost related to the preparation of this RFP and any related activities are the responsibility of the Respondent. MHA assumes no liability for any costs incurred by the Respondent throughout the entire selection process.

## **2.13 Best Available Data**

All information contained in this RFP is the best data available to MHA at the time the RFP was prepared. The information given in the RFP is not intended as representation having binding legal effect. This information is furnished for the convenience of Respondents and MHA assume no liability for any errors or omissions.

## **2.14 Contact with MHA Staff, Board Members and Residents**

Beyond the above referenced written communications, Respondents and their representatives may not make any other form of contact with MHA staff, Board members, or residents. Any improper contact by or on behalf of Respondents may be grounds for disqualification.

## 2.15 Licenses and Insurance

The awarded individual/firm shall have and maintain all required licenses necessary to conduct business in the City of Montgomery and the State of Alabama. All licenses must be kept up to date for the duration of any ensuing contract. Copies of all licenses must be in the Procurement/Contract office prior to contract execution.

Prior to contract award and for the duration of the contract, the successful proposer will be required to provide proof of insurance (as outlined) and the MHA shall be named as an additional insured.

Professional Liability (and/or Errors & Omissions) Coverage	\$1,000,000 each occurrence
General Liability Coverage	\$1,000,000 each occurrence
Comprehensive Automobile Liability Coverage	\$1,000,000 each occurrence
Worker's Compensation with Statutory Limits of the State of AL	

## 2.16 Respondent Responsibilities

Each Respondent is presumed by MHA to have thoroughly studied this RFP and become familiar with the contents, locations, and nature of requests. Any failure to understand completely any aspect of this RFP is the responsibility of the Respondent.

## 2.17 No Claim Against MHA

The Respondent shall not obtain, by submitting a proposal in response to this RFP, any claim against MHA or MHA's property for reason of all or any part of any of the following: the selection process; the rejection of any or all offers; the acceptance of any offer; entering into any agreements or the failure to enter any agreements; any statement, representations, acts or omissions of MHA or any person or entity acting on its behalf; the exercise of any discretion set forth in or concerning any of the foregoing; and any other matters arising out of the foregoing.

## PART III – SUBMISSION REQUIREMENTS

### 3.1 Tabbed Proposal Submittal

The Agency intends to retain the Contractor pursuant to a "Best Value" basis, not a "Low Bid" basis ("Best Value," in that the Agency will, as detailed within the following Section 5.2, consider factors other than cost in making the award decision). Therefore, so that the Agency can properly evaluate the offers received, all proposals submitted in response to this RFP must be formatted in accordance with the sequence noted within the table below. Each category must be separated by numbered index dividers, which number extends so that each tab can be located without opening the proposal and labeled with the corresponding tab reference also noted below. None of the proposed services may conflict with any requirement the Agency has published herein or has issued by addendum.

RFP Section	Tab No.	Description
3.1.1	1	<b>Form of Proposal.</b> This 2-page Form must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
3.1.2	2	<b>Form HUD-5369-C Certifications and Representations of Offers Non-Construction, Form HUD SF-LLL Disclosure of Lobbying Activities, Form HUD 50071 Certification of Payments to</b>

		<b><i>Influence Federal Transactions, Form HUD 50070 Certification for a Drug-Free Workplace, and Form HUD 2530 Previous Participation Certification.</i></b> These forms must be fully completed, executed where provided thereon and submitted under this tab as a part of the proposal submittal.
<b>3.1.3</b>	<b>3</b>	<b>Profile of Firm Form.</b> This 2-page Form must be fully completed, executed, and submitted under this tab as a part of the proposal submittal.
<b>3.1.4</b>	<b>4</b>	<b>Proposed Services.</b> The proposer shall place under this tab documentation further explaining the proposer’s services and showing how the proposer intends to fulfill the requirements of the Scope of Work listed in the preceding Section Part IV herein, including, but not limited to:
<b>3.1.4.1</b>		The proposer’s <b>DEMONSTRATED UNDERSTANDING</b> of the <b>AGENCY’S REQUIREMENTS</b> .
<b>3.1.4.2</b>		The <b>APPROPRIATENESS</b> of the <b>TECHNICAL APPROACH</b> and the <b>QUALITY</b> of the <b>SERVICES PROPOSED</b> .
<b>3.1.4.3</b>		The proposer’s <b>TECHNICAL CAPABILITIES</b> (in terms of personnel) and the <b>MANAGEMENT PLAN</b> (including the ability to provide the services detailed herein).
<b>3.1.4.4</b>		The proposer’s <b>DEMONSTRATED EXPERIENCE</b> in performing similar work and the proposer’s <b>DEMONSTRATED SUCCESSFUL PAST PERFORMANCE</b> (including meeting costs, schedules, and performance requirements) of contract work substantially similar to that required by this solicitation as verified by reference checks or other means.
<b>3.1.4.5</b>		If appropriate, how staff are retained, screened, trained, and monitored.
<b>3.1.4.6</b>		The proposed quality control program.
<b>3.1.4.7</b>		An explanation and copies of forms that will be used and reports that will be submitted and the method of such reports (i.e. written; fax; Internet; etc.).
<b>3.1.4.8</b>		A complete description of the products and services the firm provides.
<b>3.1.4.9</b>		<b>Proposed Engagement Letter.</b> A copy of the proposer’s proposed engagement letter. Please note that the Agency WILL NOT accept this engagement letter as the eventual contract, but will consider including the proposed engagement letter as an appendix to the eventual contract that is executed. The Agency retains the right to (and most likely will) require certain revisions to the engagement letter, especially of proposed terms that either, in the Agency’s opinion, conflict with the terms listed within the contract.
<b>3.1.5</b>	<b>5</b>	<b>Managerial Capacity/Financial Viability/Staffing Plan.</b> The proposer’s entity must submit under this tab a concise description of its managerial and financial capacity to deliver the proposed services, including brief professional resumes for the persons identified within areas (5) and (6) of the, <b>Profile of Firm Form</b> . Such information shall include the proposer’s qualifications to

		provide the services; a description of the background and current organization of the firm (including a current organizational chart).
<b>3.1.6</b>	<b>6</b>	<b>Client Information.</b> The proposer shall submit a listing of former or current clients, including any other Public Housing Authority, for whom the proposer has performed similar or like services to those being proposed herein. The listing shall, at a minimum, include:
<b>3.1.6.1</b>		The client's name;
<b>3.1.6.2</b>		The client's contact name;
<b>3.1.6.3</b>		The client's telephone number and email address;
<b>3.1.6.4</b>		A brief description and scope of the service(s) and the dates the services were provided.
<b>3.1.7</b>	<b>7</b>	<b>Equal Employment Opportunity/Supplier Diversity.</b> The proposer must submit under this tab a copy of its Equal Opportunity Employment Policy and a complete description of the positive steps it will take to ensure compliance, to the greatest extent feasible, with the regulations detailed within the following Section 3.6 herein pertaining to supplier diversity (e.g. small, minority-, and women-owned businesses).
<b>3.1.8</b>	<b>8</b>	<b>Subcontractor/Joint Venture Information (Optional Item).</b> The proposer shall identify hereunder whether or not he/she intends to use any subcontractors for this job, if awarded, and/or if the proposal is a joint venture with another firm. Please remember that all information required from the proposer under the preceding tabs must also be included for any major subcontractors (10% or more) or from any joint venture.
<b>3.1.9</b>	<b>9</b>	<b>Section 3 Business Preference Documentation (Optional Item).</b> For any proposer claiming a Section 3 Business Preference, he/she shall under this tab include the fully completed and executed Section 3 Submittal Form, Section 3 Business Preference Certification Form and any documentation required by that form.
<b>3.1.10</b>	<b>10</b>	<b>Other Information (Optional Item).</b> The proposer may include hereunder any other general information that the proposer believes is appropriate to assist the Agency in its evaluation.
<b>3.1.11</b>		<b>No Information Placed under a Tab.</b> If no information is to be placed under any of the above noted tabs (especially the "Optional" tabs), please place there under a statement such as "NO INFORMATION IS BEING PLACED UNDER THIS TAB" or "THIS TAB LEFT INTENTIONALLY BLANK." <u>DO NOT</u> eliminate any of the tabs.
<b>3.1.12</b>		<b>Proposal Submittal Binding Method.</b> It is preferable and recommended that the proposer bind the proposal submittals in such a manner that the Agency can, if needed, remove the binding (i.e. "comb-type;" etc.) or remove the pages from the cover (i.e. 3-ring binder; etc.) to make copies, and then conveniently return the proposal submittal to its original condition.



### **3.2 Proposal Cost**

Respondents shall provide a firm total cost along with a detailed itemized breakdown of total cost. This information shall be placed under **Tab 4 Proposed Services**. Please show all expected expenditure to include all anticipated travel. Total cost must be all-inclusive.

### **3.3 Required Certifications/Forms**

Each proposal shall contain a copy of the following HUD forms, which may be downloaded from the Procurement page of the MHA website: [www.mhatoday.org](http://www.mhatoday.org).

	Section 3 Submittal Form
	Form of Proposal
	Profile of Firm Form
Form HUD-5369-B	Instructions to Offerors – Non-Construction
Form HUD 5369-C	Certifications and Representations of Offerors – Non-Construction Contract
Form HUD SF-LLL	Disclosure of Lobbying Activities
Form HUD 50071	Certification of Payments to Influence Federal Transactions
Form HUD 50070	Certification for a Drug-Free Workplace
Form HUD 2530	Previous Participation Certification

## **PART IV - SCOPE OF SERVICES**

MHA is soliciting proposals from qualified providers, to develop marketing materials for the agency, to include all sites owned and operated by the housing authority. MHA recognizes that portfolio growth, shifting consumer behaviors and evolving demographics demands a more sophisticated approach to marketing practices. Desired marketing products include, but are not limited to a video, aerial photos and glossy pamphlets/brochures.

MHA seeks a full-service marketing agency with expertise in multiple disciplines, to implement a marketing strategy which focuses on the different aspects of current and future messaging. Laying the groundwork in this manner, will ultimately lead a more streamlined and cohesive voice and ensure that the MHA's key messages are consistent across all platforms. The desired marketing strategy should focus on the following:

Reinforcing MHA's positioning in its niche market, between market rate developers/property owners that promote upscale delivery models with the flexibility to streamline for efficiency, and entities that are hampered by single-focused and rudimentary housing options/offerings.

Promoting MHA's mission, vision, successes and revitalized communities, throughout the city of Montgomery, by recognizing it as the leading provider of affordable housing in the local area.

Developing the appropriate message and select the most appropriate communications channel relevant to the various opportunities provided.

Assisting in affirmatively furthering fair housing by creating community awareness campaigns that promote public knowledge of the programs and services administered by Montgomery Housing Authority, for the people that we serve.

Highlighting MHA's on-going, and upcoming, efforts to change the face of affordable housing and the amount of construction dollars that MHA is fusing into the local economy.

Spotlighting MHA's dedication to excellent customer service for the people that we serve.

### **Contract Terms**

MHA is offering a two (2) year contract, with the option to renew for two (3) additional years, at the MHA's discretion.

## **PART V – PROCUREMENT PROCESS**

### **5.1 Proposal Evaluation/Contract Award**

Proposals received in response to this solicitation will be evaluated using the following evaluation process.

- a. The evaluation process will be used to determine the firms that will comprise the short list, from which final selection for contract award will ultimately be made.
  - (1) During the evaluation process, technical proposals will be evaluated and scored by an Evaluation Committee.
  - (2) Each member of the Evaluation Committee will score each proposal.
  - (3) Scoring will be based on predetermined Evaluation Criteria. The available points associated with each area of consideration are shown below in Item 5.2.
  - (4) The results of the evaluation, of both technical and cost proposals, will be used to determine those proposals to be considered in the competitive range.
  - (5) Proposals will be considered acceptable if they have a minimum score of 85 points and above.
  - (6) The Authority may request that proposers, whose submittals are in the competitive range, make oral presentations concerning their qualifications to the Authority's Evaluation Committee.
  - (7) Cost proposals will be considered acceptable if the proposed cost is clearly not excessive compared to the proposed costs of other Respondents with acceptable technical proposals.
  - (8) Respondents with acceptable technical and cost proposals may be requested to supply additional information to assist in completing the due diligence review. Failure to satisfactorily complete the due diligence review within the timeframe established by MHA will result in disqualification of Respondents proposals.

- b. Scoring will be based upon how well the proposal meets the criteria established in this RFP.
- c. MHA reserves the right to make no award or decline to enter negotiations should it believe that no Respondent to this RFP would be capable of delivering the necessary level of service within an acceptable price range and/or the time period.
- d. The Evaluation Committee will evaluate the merits of proposals received in accordance with the evaluation criteria stated in the RFP and formulate a recommendation. However, while a numerical rating system may be used to assist the Evaluation Committee in selecting the competitive range (if necessary) and making an award recommendation decision, the award decision is ultimately a business decision that will reflect an integrated assessment of the relative merits of the proposal using the criteria and their relative weights disclosed in the RFP.

## 5.2 Evaluation Criteria

### **a. Organizational Capacity: 30 Points**

- (1) Respondent's organizational capacity will be evaluated through an assessment of the Respondent's staff, specialists', and consultants' experience and qualifications. In addition, the Respondent's ability to perform the work in a timely manner will be evaluated through a review of previous performance on similar projects, as well as current and projected capacity and workload.
- (2) Maximum consideration will be given to those Respondents having staff with the greatest amount of experience in performing work as required herein, and who can demonstrate sufficient capacity to perform the work timely, given current and projected workload

### **b. Relevant Experience and Past Performance: 25 Points**

- (1) Relevant experience and past performance will be evaluated through an assessment of previous similarly related projects completed to date.
- (2) Maximum consideration will be given to those Respondents, who demonstrate through their submittal, a documented track record of successfully completing projects of the same type required by this RFP.
- (3) Maximum consideration will also be given to those Respondents who exhibit a successful track record of performing similar services for public housing authorities.

### **c. Respondent's Approach/Engagement Related to the Scope of Service: 25 Points**

- (1) The Respondent's approach and response to the Scope of Service will be evaluated through an assessment of the proposed approach for each element of work identified in the Scope of Service.

- (2) Maximum consideration will be given to those Respondents, who demonstrate through their submittal, a clear and prudent plan for performing the required work within the established timeframe, if applicable.

**d. Proposal Cost:**

**20 Points**

- (1) Proposal cost will be evaluated through a careful analysis of cost compared to the other Respondents proposals.
- (2) Maximum consideration will be given to those Respondents, who demonstrate through their submittals, the ability to perform the required work at minimum cost to MHA.

**Additional Points:**

**Disadvantaged Business Enterprise (DBE):**

**5 Points**

**Section 3 Participation Plan:**

**5 Points**

- (1) The level of Disadvantage Business Enterprise (DBE), Women Business Enterprise (WBE) and Section 3 participation will be evaluated through an assessment of action plans and participation schedules submitted.
- (2) Maximum consideration will be given to those Respondents, who demonstrate through their submittals, that MHA’s state participation goals, in terms of DBE, WBE and Section 3 business enterprise contracting, and Section 3 resident employment and training, will be met.

**5.3 Summary of Evaluation Criteria**

**Evaluation Criteria Points**

**Technical:**

Organizational Capacity	30 Points
Relevant Experience and Past Performance	25 Points
Respondent’s Approach/Engagement Relative to the Scope of Service	25 Points
<u>Proposal Cost</u>	<u>20 Points</u>
<b>Total</b>	<b>100 Points</b>

**ADDITIONAL POINTS:**

DBE and WBE Participation Plan	5 Points
Section 3 Participation Plan	<u>5 Points</u>
<b>Total</b>	<b>10 Points</b>

**Total Possible Points**

**110 Points**

# The Montgomery Housing Authority

525 South Lawrence Street  
Montgomery, Alabama 36104

## REQUEST FOR PROPOSAL (RFP) 2019-07

### MARKETING SERVICES

#### COST PROPOSAL FORM

**TYPE OF PROJECT:** The Montgomery Housing Authority (MHA) is seeking proposals from qualified firm(s)/individual(s) to perform marketing services.

**DATE ISSUED:** Monday, June 17, 2019

**CONTACT PERSON:** Joeretta Smith, Procurement Department  
[jsmith@mhatoday.org](mailto:jsmith@mhatoday.org)

**LAST DAY FOR QUESTIONS:** Wednesday, July 3, 2019 @ 3:00 p.m. (CST)

**SUBMISSION DEADLINE:** Wednesday, July 10, 2019 @ 3:00 p.m. (CST)

FILL IN BELOW AND SIGN. PRICES ARE GUARANTEED FOR A MINIMUM OF 180 DAYS FROM PROPOSAL DEADLINE DATE.

COMPANY NAME: \_\_\_\_\_

BY: \_\_\_\_\_  
Signature                                      Written Name                                      Title                                      Date

ADDRESS: \_\_\_\_\_  
Street / POB                                      City                                      State                                      ZIP

PHONE: \_\_\_\_\_

FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**ATTACH A COST BREAKDOWN SHOWING EXPENDITURES**