

# NEW MEXICO MORTGAGE FINANCE AUTHORITY

## Request for Qualifications

### Event and Conference Planning Services for 2025 New Mexico Mortgage Finance Authority Housing Summit



November 13, 2023

**New Mexico Mortgage Finance Authority (MFA)**  
**Request for Qualifications for**  
**Event and Conference Planning Services for the 2025 New Mexico**  
**Mortgage Finance Authority Housing Summit**

**Part I: Background & General Information**

**Introduction**

The New Mexico Mortgage Finance Authority (MFA) is a governmental instrumentality, separate and apart from the state, created by the Mortgage Finance Authority Act, N.M. Stat. Ann. Sections 58-18-1 1978 *et seq.* (1978) for the purpose of financing affordable housing for low- and moderate-income New Mexico residents.

**Purpose**

The purpose of this Request for Qualifications (RFQ) is to invite the submittal of qualification statements, in accordance with MFA Procurement Policy, from highly qualified, capable persons or firms, who by reason of their skill, knowledge, and experience are able to furnish MFA with event and conference planning services for the 2025 New Mexico Mortgage Finance Authority Housing Summit. The services will include the following:

- Strategic Planning
- Assisting in Developing an Event Budget
- Set-up of Registration System for Conference Participants (Please see explanation below)
- Organizing Sponsors including mapping Exhibitor Hall and coordinating with Hotel
- On-Site Management with Hotel/Conference Center during the Days of the Event/Conference
- Post Event Analysis of Event/Conference Logistics and Execution

**Background:**

MFA will be hosting the 2025 New Mexico Mortgage Finance Authority Housing Summit in conjunction with MFA's 50<sup>th</sup> Anniversary celebration. The Housing Summit attracts participants from around the state as well as out-of-state. Among the conference attendees are MFA non-profit service provider partners, lenders, developers, realtors, special guests such as local and state elected officials and MFA staff. Historically, the Housing Summit has been a two- and half-day event starting on Wednesday afternoon with an evening gathering, all-day Thursday and half-day Friday. The Thursday breakfast session usually has a special guest speaker, and the Thursday lunch session involves presenting various awards. Friday's breakfast event also includes a special guest speaker. With the 2025 Housing Summit coinciding with MFA's 50<sup>th</sup> Anniversary celebration, the Wednesday evening gathering will serve as a special celebration for the 50<sup>th</sup> Anniversary. Due to the number of invitees for this special celebration, this gathering will be a cocktail reception with heavy hors d'oeuvres served.

MFA is responsible for the following activities for the Housing Summit:

- Location, catering, room blocks

- MFA staff prepare 7-10 different tracks of in-depth housing content for conference participants to choose from.
  - MFA handles all of the speakers, content and presentations for these tracks.
- MFA's Marketing and Communications Department develops branding content for the conference including logo development, theme, conference materials and script for conference.
- MFA will hire videographers and photographers for the event.
- MFA has a Volunteer Coordinator that manages all MFA staff who assist in making the event run smoothly. These volunteers help manage the registration tables throughout the event and an MFA employee attends every conference session to handle the following tasks: make sure that the various speakers have all of their IT needs met, room set-up is complete, welcomes the guest speaker(s) and provide an introduction of the speaker(s), assist conference participants as needed and encourages feedback from the conference participants to the survey tool.
- MFA handles contracting with all special guest speakers.
- MFA takes the lead in contacting, developing and finalizing sponsorships (includes exhibitor booths).
- MFA develops all invite lists to ensure successful attendance and conference participation.

The Scope of Work is outlined in Part II of the RFQ, below. The Minimum Qualifications and Requirements for this RFQ are outlined in Part III of this RFQ, below. Qualification statements must address all elements outlined in the Minimum Qualifications and Requirements of this RFQ.

## Questions and Answers

Questions pertaining to this RFQ must be submitted via the MFA website at <http://www.housingnm.org/rfp> . Under "Current RFPs" select "RFQ to Provide Event and Conference Planning Services the 2025 New Mexico Mortgage Finance Authority Housing Summit." On the RFQ-specific page, select the "Event and Conference Planning Services the 2025 New Mexico Mortgage Finance Authority Housing Summit FAQs" link. Questions will be checked on a daily basis. The FAQ will open the day after the RFQ issues and will close on December 8, 2023. This timeline may be extended at MFA's discretion. To submit your questions, scroll down to the "Ask a question" section, enter your name, e-mail address, and type your question in the "Question" box, type in the two words in the CAPTCHA box and click on "Send my question." MFA will make every attempt to answer questions within two business days.

## Proposal Submission

One (1) electronic PDF copy provided via email to [smarez@housingnm.org](mailto:smarez@housingnm.org) of the Offeror's submission must be received by MFA, no later than December 8, 2023, at 4:00 PM, Mountain Standard Time. This timeline may be extended at MFA's discretion. Submissions will not be opened publicly and will not be available for public inspection until after the approved Offeror has been finalized.

Please send submission to:

Sandra Marez, Community Relations Manager  
 New Mexico Mortgage Finance Authority  
[smarez@housingnm.org](mailto:smarez@housingnm.org)

**Proposal Tenure**

All submissions shall include a statement that the proposal shall be valid until after the list of approved providers has been finalized, but no more than 60 calendar days from the proposal due date.

**RFQ Revisions and Supplements**

If it becomes necessary to revise any part of this RFQ or if additional information is necessary to clarify any provision of this RFQ, the revision or additional information will be provided on the MFA website.

**Incurred Expenses**

MFA shall not be responsible for any expenses incurred by an Offeror in responding to this RFQ. All costs incurred by Offerors in the preparation, transmittal or presentation of any proposal or material submitted in response to this RFQ will be borne solely by the Offerors.

**Cancellation of Requests for Proposals or Rejection of Proposals**

MFA may cancel this RFQ at any time, for any reason and may reject all proposals (or any proposal) which are/is not responsive.

**Evaluation of Proposals, Award Notice and Engagement Letters**

Proposals will be evaluated by the Internal Review Committee of MFA staff using the criteria listed in Part V: Evaluation Criteria. The Internal Review Committee will make a recommendation to the MFA Policy Committee. MFA shall provide written notice of the award to all Offerors within 10 days of the date of the award.

For any given engagement, MFA reserves the right to select the Offeror that best serves MFA's interests. No one factor in the Evaluation Criteria will solely determine the Offeror but will help MFA determine the Offerors to interview. MFA intends to interview the highest scoring Offerors as determined by the Evaluation Criteria. The basis for individual selections will be documented by MFA. MFA shall require Offeror(s) to enter into an engagement letter signed by both parties upon engagement.

**Proposal Confidentiality**

Offerors or their representatives shall not communicate with MFA's Board of Directors or staff members regarding any proposal under consideration or that will be submitted for consideration, except in response to an inquiry initiated by the Internal Review Committee, or a request from the Board of Directors for a presentation and interview. A proposal will be deemed ineligible if the Offeror or any person or entity acting on behalf of Offeror attempts to influence members of the Board of Directors or staff during any portion of the RFQ review process, including any period immediately following release of the RFQ. Until the award is made, and notice given to all Offerors, MFA will not disclose the contents of any proposal or discuss the contents of any proposal with an Offeror or potential Offeror, so as to make the contents of any offer available to competing or potential Offerors.

**Irregularities in Proposals**

MFA may waive technical irregularities in the form of proposal of any Offeror selected for award which do not alter the price, quality or quantity of the services offered. Note especially that the date and time of proposal submission as indicated herein under Part I: Background and General Information, Proposal Submission cannot be waived under any circumstances.

### **Responsibility of Offerors**

If an Offeror who otherwise would have been awarded a contract is found not to be a Responsible Offeror, a determination that the Offeror is not a Responsible Offeror, setting forth the basis of the finding, shall be prepared and the Offeror shall be disqualified from being placed on a list of approved providers. A Responsible Offeror means an Offeror who submits a proposal that conforms in all material respects to the requirements of this RFQ and who has furnished, when required, information and data to prove that his financial resources, facilities, personnel, reputation and experience are adequate to make satisfactory delivery of the services described in this RFQ. The unreasonable failure of an Offeror to promptly supply information in connection with an inquiry with respect to responsibility is grounds for a determination that the Offeror is not a Responsible Offeror.

### **Part II: Services to Be Performed**

Services to be provided under this RFQ could include, but are not limited to, strategic planning, assisting in developing a budget, registration of conference participants, on-site management with hotel during the days of the event/conference and post event analysis of event/conference logistics and execution. While the below scope of work summarizes all the work that could be done with MFA, the specific scope of work for each engagement will be memorialized in an engagement letter.

1. **Strategic Planning**

Offeror would facilitate a strategic planning session for MFA Management and key staff involved in planning the 2025 New Mexico Mortgage Finance Authority Housing Summit. Strategic Planning session will involve establishing goals of the conference, discussion of theme, timeline, and deadlines for action, establishing what party is responsible for deliverables, etc.

2. **Assist in Developing a Budget for the Conference**

Offeror will assist MFA in developing a budget for the conference. As part of this process, Offeror will help MFA decide what different sponsorships levels for the conference will be offered and make sure that all sponsorship levels are clearly differentiated so that sponsors understand the value they will be receiving. Once the budget for the conference has been developed, Offeror may be called upon for their professional expertise and connections to help MFA stay within the budget established.

3. **Set-Up Registration System for the Conference**

Offeror will develop or establish a registration conference tool for the use of MFA in registering conference participants, speakers, special guests, and MFA staff (volunteers). However, MFA is also open to handling the registration process in-house but would need assistance in establishing a software tool to set up the different types of registration. Depending on how

much or how little of this service will be administered by the Offeror, please reflect that in the all-inclusive fee and provide an explanation of how this would work for both parties.

4. **On-Site Management with Hotel/Conference Center during the Days of the Event/Conference**

Offeror will be responsible for assisting MFA lead staff person during the days of the event/conference. Offeror will help trouble shoot any unforeseen circumstances that arise involving conference participants, speakers, and hotel management. The offer will be expected to be at the conference facility/location in advance of the formal program starting to conduct a walk through with MFA staff to ensure that all last-minute details have been accounted for.

5. **Post Event Analysis of Event/Conference Logistics and Execution**

Offeror will prepare a post-event analysis/report to MFA of event/conference logistics and execution including responsiveness of hotel management and staff to various requests, set-up of facility rooms and IT equipment, quality of catering, ease and accuracy of registration, status of budget, feedback from sponsors and participants. As part of this analysis, MFA would expect input on how to improve the Housing Summit for future attendees including sponsors.

**Part III: Minimum Qualifications and Requirements**

A. Only those Offerors who meet the following minimum qualifications are eligible to submit a proposal pursuant to this RFQ:

1. Offeror must demonstrate that it has significant, current, and past experience/knowledge in event and conference planning including multiple day events hosting over 350 conference participants. A minimum of three (3) years' of experience with this work.
2. Offeror must be licensed/registered/certified in the state of New Mexico and in good standing pursuant to the relevant licensing laws.

B. Selected Offerors must also meet the following requirements:

1. No Board member or employee of MFA shall have any direct financial interest in any contract with the Offeror, nor shall any contract exist between Offeror or its affiliate with any MFA Board member or employee that might give rise to a claim of conflict of interest. Any violation of this provision will render void any contract between MFA and the Offeror for which MFA determines that a conflict of interest exists as herein described, unless that contract is approved by MFA's Board of Directors after full disclosure.
2. Offeror shall provide a statement disclosing any political contribution or gift valued in excess of \$250 (singularly or in the aggregate) made by Offeror or on Offeror's behalf to any elected official of the state of New Mexico currently serving or who has served on MFA's Board of Directors in the last three (3) years.
3. Offeror shall at all times conduct itself in a manner consistent with MFA's Third-Party Code of Conduct and MFA's Anti-Harassment Policy. A copy of MFA's Third-Party Code of Conduct and MFA's Anti-Harassment Policy is posted on the MFA website for review at <http://www.housingnm.org/rfp>. Upon request by MFA, Offeror shall disclose information MFA may reasonably request relating to conflict or potential conflicts of interest.

4. Offeror shall be Equal Opportunity Employer and comply fully with all government regulations regarding nondiscriminatory employment practices.

#### **Part IV. Fees/Compensation**

Fee basis should be an all-inclusive fee, which should include staff time and “out-of-pocket expenses.” Offeror must provide a fee breakdown for each service as specified under the RFQ. If selected, engagement letters with Offeror must reflect the all-inclusive fee rates proposed.

Billing on the project should occur on a frequency to be negotiated with successful Offeror(s) and may be staggered in phases to ensure successful completion of each service as specified in the RFQ.

#### **Part V: Evaluation Criteria**

##### **A. Minimum Threshold Requirements**

Responses must meet the following minimum requirements in order to qualify for further consideration:

1. The response must be complete and legible and must be submitted by the application deadline.
2. Offeror must demonstrate that it has significant, current and past experience/knowledge in event and conference planning including multiple day events hosting over 350 conference participants. A minimum of three (3) years’ experience with this work.
3. Offeror must provide evidence of being licensed/registered/certified in the state of New Mexico and in good standing pursuant to the relevant licensing laws as described in Part III.A.2 of this RFQ.

##### **B. Evaluation of Submittals**

MFA shall select Offerors that are most advantageous to MFA. No one factor in the Evaluation Criteria will solely determine the Offeror but will help MFA determine the Offerors to interview. MFA intends to interview the highest scoring Offerors as determined by the Evaluation Criteria. Proposals shall be scored on a scale of one to 110 based on the criteria listed below. Please note, however, that a serious deficiency in any one criterion may be grounds for rejection regardless of overall score.

Offeror meeting the minimum threshold requirements and achieving the maximum Evaluation Criteria score will be selected for the event and conference planning services for the 2025 New Mexico Mortgage Finance Authority Housing Summit.

Criteria	Point Range	Maximum Points
<b>1. Experience and Capability:</b> Evaluation of the professional qualifications, background and	<b>0-50</b>	<b>50</b>

experience of the Offeror (please be prepared to provide specific examples), including: <ul style="list-style-type: none"> <li>• Planning and executing a multiple day event/conference with over 350 conference participants.</li> <li>• Expertise in assisting clients stay on budget.</li> <li>• Experience in troubleshooting and dealing with hotel management.</li> </ul>		
<b>2. Timeline and Capacity</b> Evaluation of Offeror's availability and proposed timeline to provide services. Evaluation of Offeror's key staff that will be assigned to this contract including their years of experience and expertise.	<b>0-20</b>	<b>20</b>
<b>3. All-Inclusive Fees/Compensation:</b> The Offeror with the lowest all-inclusive fee will be awarded 20 points. All other Offeror(s) will receive a lower number of points proportionate to the difference in the average fees.	<b>0-20</b>	<b>20</b>
<b>4. References: Minimum of three (3) references.</b>	<b>0-10</b>	<b>10</b>
<b>5. Interview:</b>	<b>0-10</b>	<b>10</b>
<b>Maximum Points</b>		<b>110</b>

#### **Part VI: Offeror Submission Instructions and Format**

Submissions must, at a minimum, contain the following information and shall be organized as follows:

1. Letter of Transmittal – to include at least the following information:
  1. Name, address and telephone number of Offeror and name of contact person;
  2. A signature of the Offeror or any partner, officer or employee who certifies that he or she has the authority to bind the Offeror;
  3. Date of submission;
  4. A statement that the Offeror will comply with the terms and conditions set forth in this RFQ and in any engagement letter;
  5. A statement describing how long the Offeror can hold the all-inclusive fee, with the minimum being two years from date of proposal.
  6. The location of Offeror's main office and the locations of any of Offeror's branch offices.
2. Disclosures and Certifications
  1. Offeror shall provide a statement disclosing: (1) any political contribution or gift valued in excess of \$250.00 (singularly or in the aggregate) made by Offeror to any elected official of the state of New Mexico currently serving or who has served on MFA's Board Directors in the last three years; (2) any current or proposed business transactions between Offeror and any MFA member, officer or employee; (3) any affordable housing project or development team that Offeror or Offeror's family has a financial interest or has undertaken prior work; and (4) any other conflict or potential conflict which may give rise to a claim of conflict of interest, in particular pursuant to Part III.B of this RFQ.



2. Offeror shall provide a statement disclosing any pending investigation, litigation, recent settlements or regulatory sanctions in performing professional services during the past five years involving Offeror's firm or employees or individuals or organizations involved in any third-party agreements or joint venture agreements. Describe any circumstances under which Offeror's firm or any of Offeror's members or employees have been disciplined by any professional licensing, regulatory or ethics entity. Indicate whether Offeror's firm has been involved in any capacity in litigation, investigations or regulatory proceedings involving HUD, the State of New Mexico or any agency thereof.
3. Offeror shall provide MFA with written certification that Offeror has read and shall at all times conduct itself in a manner consistent with MFA's Third-Party Code of Conduct and MFA's Anti-Harassment Policy.
4. Offer shall provide MFA with a written statement that Offeror is an Equal Opportunity Employer and complies fully with all government regulations regarding nondiscriminatory employment practices.

### 3. Experience and Capability

1. Statement describing experience and technical capability and capacity to provide responsive and professional services to MFA and to address Evaluation Criterion 1 as described in Part V.B of the RFQ.
2. A description of New Mexico clients for which Offeror has worked or performed services, currently or in the last 7 years.
3. Names and resumes of the key personnel including team lead and support staff to be assigned to MFA for purposes of this RFQ.
4. Proof that Offeror is licensed/registered/certified in the state of New Mexico and in good standing pursuant to the relevant licensing laws.

### 4. Timeline and Capacity

1. Offeror's proposal for delivering services, including organization of responsibilities, approach, and the availability of personnel for consultation and discussion, as necessary to serve the needs of MFA. Please include steps and time frames to complete all of the tasks described in Part II of the RFQ.
2. Detailed discussion of Offeror's staffing and other elements of its capacity to complete the scope of services specified in Part II of this RFQ.

### 5. All-Inclusive Fees/Compensation

Fee basis should be an all-inclusive fee, which should include staff time and "out-of-pocket expenses." If selected, engagement letters with Offerors must reflect the all-inclusive fee rates proposed. Please include a statement as to whether the Offeror's proposed rates are the best offered by the firm to similarly situated clients for similar services.

### 6. References

1. Names and contact information of at least three references who have worked with the same key personnel proposed. MFA will contact Offeror's references and evaluate references that do respond.

## **New Mexico Mortgage Finance Authority**

### **Board Members**

Chair Angel Reyes—President, Centinel Bank in Taos

Vice Chair Derek Valdo – Chief Executive Officer, AMERIND Risk

Treasurer Rebecca Wurzbarger – Strategic Planning Consultant

Member Howie Morales—Lieutenant Governor, State of New Mexico

Member Raul Torrez —Attorney General, State of New Mexico

Member Laura M. Montoya —Treasurer, State of New Mexico

Member, Patricia Sullivan, Ph.D. – Associate Dean, New Mexico State University, College of Engineering

### **Management**

Isidoro Hernandez, Executive Director/CEO

Arundhati Bose, CPA, Chief Financial Officer

Donna Maestas-DeVries, Chief Housing Officer

Jeff Payne, Chief Lending Officer

## EVENT AND CONFERENCE PLANNING SERVICES RFQ ORGANIZATIONAL

### REFERENCE QUESTIONNAIRE FOR:

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This form is being submitted to your company for completion as a business reference for the company named above. This form is to be returned to the New Mexico Mortgage Finance Authority via facsimile or e-mail at:

Name: Sandra Marez  
Address: 344 4th St. SW Albuquerque, NM, 87102  
Telephone: 505-767-2223  
E-mail: [smarez@housingnm.org](mailto:smarez@housingnm.org)

No later than **December 8, 2023 at 4:00 p.m. Mountain Time** and must **NOT** be returned to the company requesting the reference.

For questions or concerns regarding this form, please contact the individual first named above.

Company providing reference:	
Contact name and title/position:	
Contact telephone number:	
Contact e-mail address:	
Description of services provided:	
Dates services provided (starting and ending):	

1. How would you rate the timeliness of work conducted and information requested?

\_\_\_\_\_ (3=Excellent      2=Satisfactory      1=Unsatisfactory

0=Unacceptable) COMMENTS:

2. How would you rate how the work was planned and executed?

\_\_\_\_\_ (3=Excellent      2=Satisfactory      1=Unsatisfactory  
0=Unacceptable) COMMENTS:

3. How would you rate the knowledge and technical expertise demonstrated?

\_\_\_\_\_ (3=Excellent      2=Satisfactory      1=Unsatisfactory  
0=Unacceptable) COMMENTS:

4. How would you rate the value added to your organization through the Offeror's recommendations?

\_\_\_\_\_ (3=Excellent      2=Satisfactory      1=Unsatisfactory  
0=Unacceptable) COMMENTS:

5. With which aspect(s) of this Offeror's services are you most satisfied?

COMMENTS:

6. With which aspect(s) of this Offeror's services are you least satisfied?

COMMENTS:

7. Would you recommend this Offeror's services?

COMMENTS: