



**Village of Vinton, Texas**  
**REQUEST FOR QUALIFICATIONS (RFQ)**  
**Municipal Advisory Services**  
**RFQ: 2025-003**

## **I. INTRODUCTION**

The Village of Vinton, Texas (the "Village") is soliciting statements of qualifications from qualified firms to provide municipal advisory services. The selected firm will assist the Village in making high-quality debt management decisions, ensuring that such decisions are viewed positively by rating agencies, the investment community, and the public. Additionally, the firm will support internal and external approval processes for debt issuances and demonstrate a strong commitment to long-term financial planning.

## **II. SCOPE OF SERVICES**

The selected municipal advisor will provide professional services that include, but are not limited to, the following:

- 1. Debt Management and Issuance Support**
  - Provide strategic advice on the issuance of debt, including bonds, certificates of obligation, and other financing instruments.
  - Develop debt issuance strategies that align with the Village's financial policies and goals.
  - Assist in structuring and timing of debt issuances to optimize market conditions and minimize costs.
  - Ensure compliance with all applicable federal, state, and local laws and regulations.
- 2. Credit Rating and Market Positioning**
  - Provide guidance to maintain and enhance the Village's credit rating.
  - Facilitate communication with rating agencies to ensure transparency and a strong financial reputation.
  - Advise on strategies to improve investor confidence and marketability of Village debt.
- 3. Financial Planning and Policy Development**
  - Assist in the development and implementation of long-term financial strategies.
  - Provide recommendations on policies related to debt management, reserves, and capital planning.
  - Support the Village's efforts in financial forecasting and modeling.
- 4. Internal and External Stakeholder Engagement**
  - Present debt management strategies to Village officials, staff, and the public.
  - Assist in public outreach efforts to ensure transparency and community support for financial decisions.
  - Provide training and educational materials on municipal debt management best practices.

## **III EVALUATION FACTOR DESCRIPTION**



The maximum points that shall be awarded for each of the Evaluation Factors are detailed and described below.

**Factor A – Firm’s Experience in Municipal Advisory Services.....35 Points**

The firm should provide a description, including resumes, of the professional(s) that will provide direct municipal advisory services to the Village, including the name of the lead consultant for this account and his/her primary office location. The primary individual assigned to the Village should be a licensed public finance professional. The firm must be licensed in the State of Texas.

Indicate the individual’s relevant experience, relevant licenses they hold and how their particular area of expertise would benefit the Village. Specifically include experience with long-term strategic financial planning, Texas public finance laws, tax-exempt new money, advance and current refunding’s, taxable financings, marketing and pricing of issues, technical analysis, arbitrage strategies and rating agencies.

Describe in detail the experience your firm has in working with an issuer similar in size and complexity to the Village. Include details regarding the type of expertise your firm offers in similar transactions. Describe the firm’s experience in presentations to governing boards. Describe the firm’s experience in assisting Cities with rating agency presentations. Experience in managing federal/state-funded programs.

**Factor B – Financing Techniques.....20 Points**

Describe the firm’s depth of knowledge of Texas Cities financing techniques and provide a list of the municipal tax-exempt and taxable financings that have been completed for the last 5 years for which the firm served as municipal advisor for cities in the State of Texas. Please include issuer, issue description, and par amount.

**Factor C – Experience – Comparable Contracts.....15 Points**

Offeror to provide three (3) contracts comparable in scope within the past five (5) years and have performed for at least five (5) years prior to bid opening. Contract will be considered comparable in scope if they include the following elements: provide Municipal Advisory Services related to the authorization and issuance of debt instruments or other securities as well as debt management planning services as requested by the Village Administrator and/or Designee. Offeror is required to use the Experience – Comparable Contract Form for this factor. Contracts not comparable in scope will not be evaluated.

Note: The maximum points for each contract will be determined by dividing the points allocated to this factor by 3 (i.e. 15 total points ÷ 3 = 10 points per contract).

**Factor D – References .....10 Points**

Offeror shall provide references for three (3) contracts listed for Factor C.

A contract deemed non-comparable under Factor B shall not be considered as a viable reference under Factor C and shall not be scored.

Note: The maximum points for each reference will be determined by dividing the points allocated to this factor by 3 (i.e. 30 total points ÷ 3 =10 points per reference).



**Factor E – Local Knowledge and Support .....15 Points**

A critical aspect of providing quality service is access to the Municipal Advisor. The firm should provide a brief description of the firm’s presence and knowledge of the El Paso area tax-exempt bond market and resources dedicated to the El Paso area. The selected firm will provide the location of the office responsible for the day-to-day contact, hours of operation, secondary offices and other contact support to be provided.

Describe the firm’s experience and/or knowledge of the Village’s political, economic, financial, legal or other issues and environment that may affect a proposed financing. Describe the firm’s familiarity with GFOA’s Recommended Practices relating to the selling of bonds and the selection of finance professionals. Please provide any other information that the Village should consider in selecting its Municipal Advisor.

**Factor F – Trading Desk or Other Source of Market Information.....5 Points**

If applicable, a complete description of the firm’s short and long-term municipal underwriting and trading desk activities should be included in the proposal for evaluation by the Evaluation Committee. If the firm does not have its own underwriting desk, then describe other resources the firm will use to provide pertinent pricing and market information

**MAXIMUM TOTAL POSSIBLE POINTS.....100 Points**

**IV. SUBMISSION REQUIREMENTS**

Interested firms must submit their qualifications with three (3) electronic and/or hard copies by **May 9<sup>th</sup>, 2025 10:00 AM (Mountain Time Zone)** submitted to:

**Village of Vinton  
Attn: Village Administrator  
RE: RFQ 2025-003  
436 E. Vinton Rd.  
Vinton, TX 79821**

All submissions must be received by the deadline to be considered. Late submissions will not be accepted.

**V. PROPOSAL FORMAT AND STRUCTURE**

All submissions must follow the submission guidelines below. The Village reserves the right to reject proposals not in compliance with these requirements.



1. Use fonts no smaller than Times New Roman, 10 point. Maximum length including title page, the entire proposal, and appendices should not exceed 100 pages but may be required in some instances.
2. All pages must be numbered.
3. Address qualifications criteria in the order presented in PART VI – SELECTION PROCESS.
4. Major sections must have page breaks between them and the following sections.
5. The proposal must be signed and titled by a duly authorized representative of the Offeror. In addition, the Village requires that all proposals contain the following:
6. Title Page – Clearly label with the RFQ number, RFQ title, Offeror’s name, mailing address, and fax number, and the name, telephone number, and email address of a contact person.
7. Table of Contents – Identify the page location of each major section.
8. Introduction – Provide brief narrative of background and general qualifications of the Offeror, including any experience with services/products similar in scope and/or size to those requested in this RFQ.
9. Offeror’s Proposal – Include all pages from this Request for Qualifications in addition to any other materials submitted by the Offeror. State in succinct terms the Offeror’s understanding of the services to be provided and how the Offeror anticipates being able to meet the scope of work as delineated within Part II SCOPE OF SERVICES.
10. Contract Clauses and Forms – Include all pages and completed forms. In addition to the above information, describe any prior or pending litigation, civil or criminal, involving a governmental agency or which may affect the performances of the services to be rendered. This includes any instances in which the Offeror or any of its employees, subcontractors, or sub-consultants is or has been involved within the last three years.
11. Client list – for historical purposes, please provide the name and addresses of organizations that have used your company for similar products/services within the last five years.
12. Response must demonstrate your comprehension of the objectives and services from the RFQ. Do not merely duplicate the Scope of Work as presented within this RFQ.
13. Appendices – include any additional information that the Offeror deems important to the decision process but that is not specified elsewhere in the RFQ.
14. Identify by name and title the individual responsible for the administration of the project. (That is, the individual who has the responsibility to oversee the contract, not a firm's contract negotiator, etc.)



15. Identify the project organization and staffing. A project organizational chart is to be provided, along with resumes of the personnel assigned to the project. Level of staff for work to be performed under this Contract. Proposals must describe the work to be performed by the individuals you name to perform essential functions and detail their specific qualifications and substantive experience directly related to this RFQ. A response prepared specifically for this RFQ is required. Marketing resumes often include non-relevant information that may detract from the evaluation of a proposal. Lists of projects are not useful. Focus on individual's specific duties and responsibilities and how project experience is relevant to the requirements of this RFQ.

16. A list of references that can be contacted to discuss the performance on similar work. If available, provide a sample of comparable data your firm has generated for a similar project. References that are not relevant to RFQ should not be included. Therefore, the References provided should be directly related to the requirements in the SOW. The Village is particularly interested in government references. The Village may obtain other information by sending out questionnaires and/or through other sources. References other than those identified by the Offeror may be contacted by the Village with the information received used in the evaluation.

17. Additional Information. Offerors are asked not to include loose brochures (e.g. general marketing material). **BROCHURE MATERIAL WILL NOT BE CONSIDERED FOR REVIEW.** Only pertinent information should be submitted.

## **VI. SELECTION PROCESS**

The proposal evaluation process is designed to award the contract, not necessarily to the Respondent of least cost, but rather to the Respondent with the best combination of attributes (i.e., qualifications and experience, cost) based upon the evaluation factors specifically established for this RFQ.

Respondents must provide all information outlined in the Evaluation Factors to be considered responsive. Proposals will be evaluated based on the responsiveness of the Respondent's information to the Evaluation Factors, which will demonstrate the Respondent understands of the Evaluation Factors and Village to perform the required services of this Request for Qualifications.

Proposals will be evaluated based on the following Evaluation Factors:

- Firm's Experience in Municipal Advisory Services (35 Points)
- Financing Techniques (20 Points)
- Experience – Comparable Contracts (15 Points)
- References (10 Points)
- Local Knowledge and Support (15 Points)
- Trading Desk or Other Source of Market Information (5 Points)

The Village reserves the right to conduct interviews with shortlisted firms and may request additional information as necessary.



## **VII. SCHEDULE AND SUBMITTALS:**

- Publication: April 21 and 28, 2025 (El Paso Times)
- Optional Conference: April 30, 2025 at 3:00 PM (Mountain Time Zone)
- Last Day to Submit Questions: May 2, 2025 at 11:30 AM (Mountain Time Zone)
- Statement of Qualifications Due: May 9, 2025, 10:00 AM (Mountain Time Zone)
- Selection expected by: May 20, 2025
- Contract Execution expected by: June 3, 2025

## **VIII. TERMS AND CONDITIONS**

- The Village reserves the right to accept or reject any or all responses.
- This RFQ does not constitute a commitment to contract for services.
- Any costs incurred in the preparation of responses are the sole responsibility of the responding firm.
- The initial term of this contract shall be for five (5) years with the option to extend the term of the contract for up to two (2) additional term of one (1) year each.
- A Fee Proposal will be requested from the highest ranked proposer.

## **VIII. QUESTIONS AND CLARIFICATIONS**

All questions related to this RFQ should be submitted in writing to [dbueno@vintontx.us](mailto:dbueno@vintontx.us) no later than **May 2, 2025 at 11:30 AM (Mountain Time Zone)**. Responses will be provided to all interested firms.