



Harrison-Clarksburg Board of Health

330 W. Main Street
Clarksburg, WV 26301
Phone: 304-623-9308
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HARRISON-CLARKSBURG BOARD OF HEALTH REQUEST FOR PROPOSALS FINANCIAL INVESTMENTS SERVICES

Direct all replies to:

Joseph C. Bundy
C/O Harrison-Clarksburg Board of Health
330 West Main Street
Clarksburg, WV 26301
(304)623-9308

Joseph.C.Bundy@wv.gov

**PROPOSALS MUST BE RECEIVED NO LATER THAN:
December 19th, 2023 at 3:00PM**

GENERAL INFORMATION FOR BIDDERS

PURPOSE

The Harrison-Clarksburg Board of Health (HCBOH) is seeking proposals from qualified, licensed, West Virginia Financial Investment Companies with demonstrated professional experience and expertise.

ISSUING OFFICE/PROJECT ADMINISTRATOR

This RFP is issued by the Harrison-Clarksburg Board of Health.

All questions regarding this RFP shall be made at the following address:

Joseph C. Bundy, Administrator
Harrison-Clarksburg Board of Health
330 West Main Street
Clarksburg, WV 26301

The HCBOH is not liable for any costs incurred by any bidder for the RFP prior to the signing of a contract, nor shall the HCBOH be liable for any expenses incurred in replying to any request for proposal or invitation to bid.

SCOPE OF SERVICES

The selected financial investment company will be able to provide the following services:

1. Have a full understanding of West Virginia Code:8-13-22A and how it applies to the investment of municipal funds and present only potential investments that meet the full scope of this law.
2. Possess the ability to manage investments in a range of \$500,000 to \$850,000.
3. Present investments like (Certificate of Deposit) or (Bonds) and others that guarantee earned interest over the maximum amount of years possible.
4. Provide a comprehensive listing of restrictions concerning any funds invested.
5. Ensure that the full amount of principal and accrued interest concerning any deposits is insured by the Federal Deposit Insurance Corporation.

PROPOSAL CONTENT

A written statement of Qualifications should be provided and include:

1. A statement of experience working with other governmental organizations with their financial investments.
2. Identification of the agent and/or agent team and their qualifications.
3. Present potential investment strategies

4. Time frame to complete any application and documentation needed prior to investing.
5. Please present any fees, costs, and/or expenses that may be attributed to any investments.
6. Statement regarding any conflicts of interest and listing of any litigation involving the firm in the past five(5) years and lawsuit dismissal and/or termination outcomes.

SELECTION PROCESS

The HCBOH will review all proposals.

The HCBOH shall rate each proposal based upon the following factors.

1. Responsiveness and clarity of the proposal
2. Experience in working with governmental agencies and organizations.
3. Schedule and cost of services.
4. Presentation of potential financial investments.

The HCBOH reserves the right to reject any and all proposals and to waive any irregularities or informalities. The RFP does not commit the HCBOH to award or contract, nor pay any costs incurred, in the preparation and submission of proposals in the anticipation of a contract. The HCBOH intends to select a firm, that demonstrates in the HCBOH's sole opinion, that it is the most highly qualified firm to provide the scope of services. With the most highly qualified firm, the HCBOH will negotiate a contract for the provision of services as presented. Should an agreement not be able to be achieved the HCBOH reserves the right to negotiate a contract with the next most highly qualified firm until a contract is achieved. The HCBOH retains all rights to solicit and enter into agreements with firms for additional services or projects deemed necessary by the HCBOH.