

REQUEST FOR QUALIFICATIONS

FOR

LEGAL SERVICES SBA 504 LOAN PROGRAM

Issued by the STL Partnership CDC

Qualifications Accepted on a Rolling Basis

Review of Qualifications Begins on:

3:00 PM on Thursday, December 21, 2023

**STL Partnership CDC
c/o St. Louis Economic Development Partnership**

ATTN: Missy DeMarco

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Introduction

The STL Partnership CDC (the “CDC”) is a Missouri nonprofit corporation in good standing organized pursuant to Chapter 355 of the Revised Statutes of Missouri for the purposes, among others, of promoting economic development in St. Louis County, Missouri, and the surrounding regions. CDC is certified by the U.S. Small Business Administration (“SBA”) to act as a Certified Development Company in order to administer the SBA 504 loan program in Missouri and eight nearby Illinois counties. The CDC is provided staff by the St. Louis Economic Development Partnership.

The CDC issues this Request for Qualifications (the “RFQ”) for qualified legal professional services firms to review SBA closing files and issue opinion letters regarding the same (the “Services”). It is anticipated that the CDC will identify a short list of qualified firms to provide the Services on an as-needed basis for up to a three-year period, ending January 2027.

Scope of Services

The successful firm’s Services to be furnished pursuant to this RFQ shall include, but are not limited to, the following:

- The successful firm shall provide an attorney to review U.S. Small Business Administration closing files under the SBA 504 loan program and issue opinion letters regarding the same.
- The attorney must have SBA designated closing counsel classification.
- The attorney’s schedule must allow for meeting a strict deadline for loans to move forward to funding.
- The attorney must be a member in good standing of the Missouri Bar *and/or* the Illinois Bar.
- The successful firm must carry professional malpractice insurance coverage with limits of at least \$1,000,000/\$1,000,000.

Submission Content

Submissions must include, at a minimum, the following information:

1. Experience/Qualifications of Firm. Provide a description of the firm’s experience in providing similar services. Provide a statement of compliance with all criteria identified in the Scope of Services section above, including bar membership.
2. Experience/Qualifications of Assigned Professional(s). Provide the qualifications for each individual who may be assigned to provide the Services and designate the individual who would have primary responsibility for oversight of the Services.
3. Availability. Provide a statement of the firm’s availability to provide the Services on an ongoing basis.

4. Approach to Diversity, Equity, and Inclusion. Provide a description of the firm’s approach to diversity, equity, and inclusion in providing the Services.
5. Proposed Fees/Expenses. Clearly state all fees and expenses to be charged in the performance of the Services:
 - a. If based on an hourly rate, provide the hourly rates to be charged for each individual who would be assigned to this engagement and a general description of how billable hours will be allocated among key personnel.
 - b. Provide an explanation if fees will be calculated on any other basis. Itemize the type of expenses (other than fees) for which your firm would seek reimbursement.
 - c. It is anticipated that a maximum not to exceed amount will be established for these Services.

Selection Criteria

Submissions will be reviewed by staff for inclusion on a list of potential qualified firms (the “Qualified List”), for up to a three-year period, ending January 2027. Final selection of a firms for the Qualified List will be made on the basis of the following criteria:

1. Qualifications, expertise, and experience of the firm in providing similar services;
2. Qualifications, expertise, and experience of the individuals assigned from the firm;
3. Availability to provide the Services;
4. Approach to diversity, equity, and inclusion;
5. Cost; and
6. Responsiveness of the firm to the RFQ categories.

The STL Partnership CDC actively encourages submission from disadvantaged business enterprises and companies owned by minorities, women, immigrants, and veterans. The CDC does not discriminate on the basis of race, color, religion, creed, sex, sexual orientation, gender identity, age, ancestry, national origin, disability, or veteran status in consideration of this award. Equal Opportunity Employer.

Terms and Conditions

The following terms and conditions apply to all submissions:

1. The CDC reserves the right to reject any and all submissions; to select one or more responding parties; to void this RFQ and the review process and/or terminate negotiations at any time; to select separate responding parties for various components of the scope of services; and to select a final party/parties from among the submissions received in response to this RFQ. Additionally, any and all RFQ project elements, requirements and schedules are subject to change and modification. The CDC also reserves the unqualified right to modify, suspend, or terminate at its sole discretion any and all aspects of this RFQ process, to obtain further information from any and all responding parties, and to waive any defects as to form or content of the RFQ or any responses by any party.
2. This RFQ does not commit the CDC to award a contract, defray any costs incurred in the preparation of a response to this RFQ, or contract for any services. All submitted responses to this RFQ become the property of the CDC as public records. All submissions may be subject to public review, on request, unless exempted as discussed elsewhere in this RFQ.
3. By accepting this RFQ and/or submitting a response thereto, each responding party agrees for itself, its successors and assigns, to hold STL Partnership CDC, the St. Louis Economic Development Partnership and its affiliated entities, St. Louis County, the City of St. Louis, and all of their various agents, commissioners, directors, consultants, attorneys, officers and employees harmless from and against any and all claims and demands of whatever nature or type, which any such responding company, its representatives, agents, contractors, successors or assigns may have against any of them as a result of issuing this RFQ, revising this RFQ, conducting the selection process and subsequent negotiations, making a final recommendation, selecting a responding party/parties or negotiating or executing an agreement incorporating the commitments of the selected responding party.
4. By submitting responses, each responding party acknowledges having read this RFQ in its entirety and agrees to all terms and conditions set out in this RFQ.
5. Responses shall be open and valid for a period of ninety (90) days from the due date of this RFQ.

Submission of Responses

Qualification submittals will be accepted throughout the 2023-2024 calendar years.

However, to ensure your firm is considered, please submit your firm's qualifications as soon as possible. The initial review of qualifications for inclusion on the Qualified List will begin after **Thursday, December 21, 2023, at 3 PM CT.**

Schedule

RFQ Newspaper Advertisement	Thursday, November 30, 2023
Review of Qualifications Begins	Thursday, December 21, 2023

Electronic submissions should be in PDF format and sent by email to mdemarco@stlpartnership.com.

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