

**EXHIBIT II
PROPOSAL INSTRUCTIONS AND
SELECTION CRITERIA**

I. PROPOSAL DELIVERY/SUBMISSION

A. Due Date: The due date for the Authority's receipt of proposals responding to this Request for Proposal ("RFP") is **4:00 p.m., Wednesday, July 6, 2011**. All proposals received after the deadline, will be ineligible for consideration.

B. Originals and Copies: Submit **one (1) original and three (3) copies** of a proposal to provide the services described in Exhibit I Scope of Work.

C. Delivery of Proposal: Addresses for the delivery of proposals are as follows:

DELIVERY VIA HAND DELIVERY OR COMMERCIAL OVERNIGHT SERVICE:

Jodi Mercer
Michigan State Housing Development Authority
735 E. Michigan Avenue
Lansing, MI 48912

DELIVERY VIA U.S. POSTAL SERVICE:

Jodi Mercer
Michigan State Housing Development Authority
P.O. Box 30044
Lansing, MI 48909

II. PROPOSAL FORMAT

A. Overview: Proposals must be submitted in the format described in Section B Format of Proposal below. There should be no attachments, enclosures or exhibits other than those considered by the prospective contractor ("Contractor") to be essential to a complete understanding of the proposal. Each section must be clearly identified with appropriate headings.

The proposal should be clear, accurate, and complete, with sufficient detail to enable the Authority to evaluate the services and methods proposed. Brevity is appreciated.

B. Format of Proposal:

1. BUSINESS ORGANIZATION Answer/Address the following:

- a. Full name of individual or firm
- b. Full physical and mailing address

2. EXPERIENCE

- a. Experience of Individual: Indicate experience possessed that you consider relevant to the successful accomplishment of the project described in this RFP. Include sufficient detail to demonstrate the relevance of such experience. Include descriptions of qualifying

experience, including similar project descriptions, costs, and starting and ending dates of projects successfully completed. Describe the education and experience of personnel who will likely be assigned to provide the proposed services (*Provide resumes or curriculum vitae of assigned personnel as attachments or enclosures*).

- b. Additional Information and Comments: Include any other information that is believed to be pertinent but not specifically requested elsewhere.

3. REQUIRED QUALIFICATIONS

- a. Nationally recognized certifications in homeownership education and pre and post purchase homeownership counselor training.
- b. Minimum of five years experience in adult education; specifically conducting homeownership counselor training.
- c. Experience with the creation of handouts, manuals, and other training materials.
- d. Authorized to conduct business in the State of Michigan.

4. PROPOSED SERVICES

- a. Service To Be Rendered: Describe the service to be rendered. (*This section should address the services sought through the Scope of Work.*)
- b. How Service Will be Rendered: Describe how the services will be rendered. Address and describe the process used to render the services.
- c. Use of Subcontractors: If any work will be subcontracted, describe the following:
 - i. Work that will be subcontracted;
 - ii. The process used to select the subcontractors;
 - iii. The contractor's experience and expertise; and
 - iv. The names of the firms/individual(s) who will perform the subcontracted work.
- d. Standards: Describe or address the following:
 - i. The standards that the services will satisfy. (If standards of a professional association will be followed, identify the standards and the association.)
 - ii. How quality of service will be monitored and ensured.
 - iii. Whether "best practices" will be followed. (If applicable, identify, the organization and/or document that establish such standards.)
- e. Security of Data: If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:
 - i. Have you established and used a policy to address the security of paper and electronic data. (*Please do not submit a copy of your security policy.*)

- ii. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)

5. PRICE PROPOSAL & BUDGET

- a. Price Proposal: All rates quoted in proposals submitted in response to this RFP will be firm for the duration of the contract. No price changes will be permitted.

Reimbursement of expenses is not allowed. Please ensure that the final rate quoted covers all provider expenses.

- b. Budget: Include in the proposal a line item budget that identifies all expenses related to the work to be performed. By submitting the bid, the provider acknowledges that it bears the risk that its expenses may exceed the proposed amount. The budget should include applicable items, which may include the following:
 - Rate per hour for consultation, research, creation of training materials and the estimated number of hours.
 - Daily or Weekly Rate to conduct training sessions.

6. SIGNATURE CLAUSE TO BE SIGNED BY AUTHORIZED SIGNATORY OF FIRM

Signature Clause: Insert the following signature clause at the end of the proposal and have an authorized signatory for the individual sign it:

I confirm that I have submitted this proposal on behalf of (INSERT NAME OF FIRM) in response to the Michigan State Housing Development Authority's Request for Proposals for Homeownership Counseling Program Training Consultant.

By: _____

Its: _____

Date: _____

III. SELECTION OF PROPOSAL

- A. Selection Criteria: The Authority's Division of Homeownership will select the proposal based on Selection Criteria listed below:

1. Education, experience, and certifications	40 Points
2. Public speaking ability	30 Points
3. Written communication skills; clarity of proposal	10 Points
4. Amount of time available to perform services	10 Points
5. Reasonableness of fee	10 Points
6. Use of sub-contractors	<u>(10) Points</u>
Total Possible Points:	100 Points

- B.** Expected Deadline for Selecting Proposal: It is anticipated that the proposal review will take one week after the closing date for submitting proposals. The Authority expects to confirm selection of the proposal by e-mail and/or First Class Mail by Wednesday, July 20, 2011.
- C.** Cancellation of Selected Proposal: The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. Reasons for canceling the selected proposal may include, but are not limited to, the following:

1. Refusal of Civil Service to process required forms; and/or
2. Refusal of duly authorized Authority signatory to execute the contract.

If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-see proposals.