

# RFP - EXHIBIT A

## SCOPE OF WORK

### I. Overview:

The Division of Homeownership of the Michigan State Housing Development Authority ("Authority") is seeking an individual/firm to:

- Manage the administration and daily operation of the IDA Program.
- Provide IDA technical assistance to Regional Coordinating Organizations, Program Sites and MSHDA staff.
- Oversee current and develop needed financial capacity for IDA Regional Coordinating Organizations and Program Sites.
- Provide MIS IDA software training.
- Ensure that policies and procedures are being followed and ensure compliance and timely reporting with state and federal guidelines.

The Authority seeks the services to assist the Division of Homeownership in the administration of the Individual Development Account Program. The service will assist working poor families save toward the purchase of a home, attain post-secondary education or start a small business by developing client financial management and budgeting plans.

### II. Objectives, Tasks & Activities, and Deadlines:

- A. Objectives.** To successfully perform the services described in Section I above, the contractor ("Contractor") must satisfy the following objectives:
1. Provide oversight of management and tracking systems of MIDAP, including direct service payments and match fund use.
  2. Coordinate the reporting and program requirements with the Regional Coordinating Offices (RCO) and Program Sites (PS).
  3. Secure additional funding to expand IDAs to underserved markets and populations.
  4. Create procedures and process flow in order to fully utilize the new IDA tax credit.
  5. Provide MSHDA with resource materials available i.e.; Policies and Procedures manuals, flow of MIDAP services.
  6. Provide RCO and PS with technical assistance and support.
  7. Provide MSHDA with requested funding and reporting activity reports.

**B. Activities/Responsibilities Necessary to Complete Scope of Work**

To achieve the objectives, the contractor ("Contractor") shall perform the following activities/tasks:

1. Review and assess the process for improving MIS IDA Data Collection. Coordinate an effort to improve knowledge and capacity of IDA Program Sites and RCOs in providing clean and accurate MIS IDA data to MSHDA on a quarterly basis and as requested.
2. Work with RCOs to increase their capacity to problem solve and formulate strategies that will systematically improve the quality and accuracy of the data IDA Programs provide to MSHDA on a quarterly and as requested basis.
3. Provide Program Sites and RCOs, as well as new staff assigned to work with MIS IDA basic "introductory MIS IDA software training," and provide advanced training through Regional Network.
4. Assemble a standardized report each quarter or as requested to MSHDA, CMF, DHS, the Banks and other funders.
5. Evaluate the potential for MIDAP programs to transfer from MIS IDA to the improved MIS IDA system, once released, or AF12, the new IDA software offered through the U.S. Health & Human Services – Office of Community Services, or another IDA tracking database.
6. Field inquiries from public, policy makers, and potential participants, program sites, funders, and partners.
7. Share information and tools with asset building programs, projects, and collaboratives, potential and existing, across the USA.
8. Facilitate the maintenance of the MIDAP web pages and listserv.
9. Participate in workgroup focused on creating permanent IDA Programs in Michigan.
10. Meet with MSHDA staff regarding the administration of the MIDAP as requested by MSHDA.
11. Submit monthly (or upon request) update reports regarding status of IDA Program, including direct service payments and match fund use.
12. Provide technical support to RCOs, Program Sites and MSHDA staff as needed.
13. Provide MSHDA with a consolidated MIDAP financial statement prepared by a Certified Public Accountant or in a manner acceptable to MSHDA.
14. Submit timely accounting and reports as required by legislation for the IDA Tax Credit.

**Deadlines for Completing Objectives.**

The Contractor shall complete/satisfy the objectives by the following dates:

1. Services shall cover work performed beginning **July 1, 2010 and ending June 30, 2011.**

**III. Standards for Performance:**

The Contractor shall perform the tasks/activities and complete the objectives in accordance with the following standards.

1. The contractor will be expected to meet program goals for services provided as described above.
2. The contractor will provide MSHDA with reporting information detailing the services provided and client success on an ongoing basis.
3. The contractor will be evaluated by their ability to raise financial support and non federal funding from multiple sources.
4. The contractor shall deliver the services in the manner directed by Authority staff.
5. The Contractor's performance under this Agreement will be reviewed at least annually to ascertain program compliance.