



REQUEST FOR PROPOSALS

DATE OF ISSUE: May 23, 2017

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for Event and Conference Planning Services**

I. Services Sought by Authority

The Michigan State Housing Development Authority (“Authority”) is seeking an organization or organizations authorized to do business in Michigan to provide the Authority with Event and Conference Planning Services. A detailed description of the work is explained in the Scope of Work of this Request for Proposals (“RFP”).

Michigan law allows for veterans preference only; however, women-owned, minority-owned, and small businesses authorized to conduct business in the State of Michigan are encouraged to submit proposals.

The Authority reserves the right to award multiple contracts as a result of this RFP.

II. Contents of this RFP

- Overview of services sought, tasks and activities (“Scope of Work” or “SOW”)
- Exhibit A – Notices to Bidders
- Exhibit B – Proposal Submission
- Exhibit C – Proposal Format
- Exhibit D – Project Personnel Form

III. Overview

The Authority seeks a conference/event planner (“Bidder” or “selected contractor”) to assist the Authority with the planning and hosting of multiple events and conferences.

By way of background, the Authority’s core mission is to provide financial and technical assistance through private and public partnerships to create and preserve safe and decent affordable housing. To accomplish this mission, the Authority has established numerous programs related to its core mission. These range from efforts to end homelessness and protecting Michigan’s cultural heritage to building partnerships with housing and community

development partners. Necessarily, to further these aims, the Authority hosts a number of conferences and events including, at a minimum: (1) Archaeology Day; (2) Asset Management Conference; (3) Authority All-Staff Meeting; (4) Building Michigan Communities Conference; and (5) Homeless Summit. Further event-specific information is provided below:

- (1) Archaeology Day. An annual, single-day event, typically held in the fall months, Archaeology Day provides the public free-of-charge the opportunity to meet archaeologists, learn about archaeological research, and see one-day-only exhibits from their excavations and underwater explorations. A cooperative venture with the Michigan History Museum, Archaeology Day offers presentations, children's activities, as well as a variety of exhibitors and special displays. In recent years, attendance has grown from approximately 300 attendees to over 1,000.
- (2) Asset Management Conference. A two-day annual event in cooperation with the US Department of Housing and Urban Development, this conference is principally designed to update housing professionals on changes in the industry, focusing on changes in laws, rules, and regulations governing the industry. An excellent networking opportunity for housing professionals, attendance is approximately 250 attendees annually.
- (3) All-Staff Meeting. A half-day event usually held annually, the all-staff meeting is held to build and reinforce Authority culture, unify around Authority strategies and goals, establish and maintain a collaborative team environment and to have fun. Attendance involves all Authority staff, approximately 350 employees, from two offices located in Lansing and Detroit.
- (4) Building Michigan Communities Conference ("BMCC"). This multi-day conference has grown to become the largest conference of its kind in the United States. The BMCC draws over 1,500 attendees representing service providers, housing professionals, as well as nonprofit and for-profit developers and financiers. Targeting all facets of the housing industry, as well as community and economic development professionals, attendance at the BMCC provides attendees with continuing education on latest developments in the industry, latest news related to private and public programs, financing and development opportunities, not to mention excellent networking opportunities.
- (5) Homeless Summit. As part of Michigan's Campaign to End Homelessness, an annual two-day summit is held in various regions of Michigan. Attended by over 300 people annually, the Summit provides a forum for federal and state government, as well as statewide services agencies, to share best practices in ending homelessness. The Summit allows time for case workers, case managers and administrators to network and collaborate to improve the welfare of the people in Michigan living in poverty and who may be homeless.

IV. Objectives, Tasks & Activities

- A. Summary.** This Section identifies the anticipated requirements of an awarded contract for conference and event planning services on behalf of the Authority.

The selected contractor will provide, as needed, planning services that may include some or all of the tasks required to execute either a conference or an event as provided above. The selected contractor will complete the duties as described below, in a timely

manner to ensure that activities will be carried out in a manner to achieve a successful conference/event (i.e., well-attended, informative, and media attention, etc.).

- B. Requirements.** The selected contractor will manage the overall planning, organization and implementation of multiple conferences and events, including but not limited to the 2018 “Building Michigan Communities Conference”, “Asset Management Conference”, “Homeless Summit”, as well as the Authority’s annual “All Staff Meeting” and “Archaeology Day” (collectively referred to as the “Event”).

Duties will include, but may not be limited to, working collaboratively with Authority staff (“Planning Committee”) and partners in administering participant registration, financial management, database management, conference evaluations, meeting planning, exhibits, speaker/presenter management, graphic design, continuing education credits, sponsorship support, and media/public relations. Detailed objectives, tasks, activities, etc., related to this request are outlined below.

Provide in your proposals how your entity will meet these requirements and describe traditional or non-traditional strategies employed to ensure a successful event.

- C. Objectives, Tasks & Activities.** The selected contractor will provide services and staff, and otherwise do all things necessary to the performance of work as provided below. The Authority will use the selected contractor’s services to perform some or all of the following tasks in the planning and execution of each Event. The lists of services to be performed will ultimately be determined on an event-by-event basis, in consultation with the selected contractor and the Authority’s Planning Committee (“Committee”). (Note that the Committee composition will necessarily vary to reflect the differing needs and goals of each individual event - comprised of Authority employees familiar with the Event, program goals, etc.). In some circumstances, service providers already under contract (e.g., media, photography) will be part of the cooperative Event planning effort to ensure success.

1. Administrative Support.

- a. For each Event identified by the Authority, the selected contractor will prepare an outline of activities, timeline and deliverables. The selected contractor will update and maintain the project timeline, as well as track responsibilities and deadlines of all parties involved in the Event.
- b. For each Event identified by the Authority, in consultation with the Authority’s Planning Committee, establish a budget for the Event.
- c. Site Selection. The selected contractor will research (which may include site visits to potential venues) potential Event venues, to include evaluation, assessment and availability of state facilities, according to the specifications provided on an event-by-event basis by the Authority. The selected contractor will solicit quotes and prepare a comparison and recommendations on the choice of venue. The selected contractor will negotiate contracts for Event space, food and beverage services, and lodging for Event participants.
- d. Committee Coordination. The selected contractor will attend (in person or via conference systems) monthly or quarterly meetings with the Committee, take meeting notes if requested and distribute those notes to Committee members. The selected contractor will serve as the central liaison to the Authority’s designated Committee throughout the course of Event planning.
- e. Audio Visual Needs Assessment; Contract Bidding/Negotiation, and Orders. Obtain audiovisual needs from conference presenters, place

orders and manage on-site to add or cancel audiovisual equipment as necessary; work within budgeted amount ordering on-site computer equipment, fax and copy machines as necessary.

- f. Event Orders Management. Place orders for meals and breaks, audiovisual needs, room sets, and timing instruction with convention services office of the venue. Review banquet orders from the venue to ensure accuracy, then edit and sign corrected orders. Place final guaranteed numbers of guests for all meals and breaks.
- g. Continuing Education Credits. Coordinate with the governing body, sign-in and sign-out sheets, tabulations of credits, and sending certificates to participants.
- h. The selected contractor will serve as the overall administrative coordinator for specific Events, including individual event-to-event database management ensuring it is up-to-date, including new requests and editing "bad addresses" for mailings.
- i. Conference/Event Scholarships. Coordinate, as appropriate, system for obtaining and administering registration and expense scholarships to an agreed-to number of organizations. Act as the central liaison for all scholarship recipients, coordinating at least 2 mailings, fielding phone calls and tracking recipient expenses.
- j. Provide Event follow-up services, including production and distribution of "thank-you" notes to speakers and volunteers. Review all financial transactions and post-event liaison with the venue, other vendors, etc.
- k. Conference & Session Evaluations. Design evaluation forms, copy and distribute to attendees, collect and merge data, and report on (a) overall conference evaluation and (b) individual session evaluation. Send evaluations to survey service (e.g., Survey Monkey) to be received within 48 hours of the conclusion of the conference. Data to be merged and organized for inclusion in the Final Report (see both Paragraph 1(l) and Paragraph 7 below).
- l. Final Report. Prepare a final report on the Event, including registration and financial data, what worked and what didn't work for the Event, and provide recommendations for future events.

2. Registration.

- a. Develop and post online registration pages on an external website for use by attendees registering for the Event.
- b. Receive registrations and payments from registrants via mail, fax and online; provide registrants with receipts for payment.
- c. Enter all data (manually enter from hard-copy submissions and download all online registrations) and maintain database of participant information.
- d. Develop a separate banking account for the Event and deposit all proceeds into the account, maintaining proper accounting at all times.
- e. Update the online registration system for all Events, as needed. The selected contractor will be responsible for the oversight and maintenance of the registration system. The selected contractor will provide for the ability for attendees to pay by credit card, PayPal, etc., as well as traditional, "paper" registration, if necessary. Both forms of registration and payment options should be available for pre-registration, as well as on-site registration the day(s) of the Event.
- f. The selected contractor will provide pre-registration and final registration reports as requested by the Authority.

- g. As necessary, provide staff to conduct on-site registration which will consist of printing a name tag for each on-site registrant on stock, collecting registration fees, and assisting volunteers with distributing conference materials (e.g., tote bag, conference information/schedule, etc.).
- h. The selected contractor will serve as the primary liaison to all registrants and speakers, including but not limited to sponsors and exhibitors if and when appropriate, and will be available via email, phone/video conference to answer questions and problem-solve all Event-related registration issues that may develop.
- i. Develop, produce and distribute, in collaboration with the Committee, confirmation materials for Event registrants (e.g., mail and email confirmation to registrants), including changes to registration confirmations.

3. On-site Support.

- a. Provide on-site support during the Event for registration, audiovisual, meeting room setup, as well as sponsor and exhibitor management. This may include using Authority staff to assist in the effort.
- b. Manage the Event on-site, serving as a liaison to the venue, participants, exhibitors and speakers. The selected contractor will provide staff as needed to manage the registration desk, oversee all room set-ups and audiovisual arrangements, and organize and oversee volunteers from the Authority and participating partner organizations. The selected contractor will provide staff to serve as room monitors and will provide training and support to moderators (selected from the planning committee organizations). The selected contractor will work with the Committee to organize and, as appropriate, instruct on-site staff with regard to their Event-related responsibilities. The selected contractor will ensure a timely and organized conference flow.

4. Financial Services.

- a. The selected contractor will establish a separate bank account for each Event and receive registration payments from event attendees, sponsors and exhibitors. The selected contractor will provide up-to-date accounting and appropriate receipts for payment.
- b. Issue payments from registration fees to other vendors for services connected with the Event as requested and authorized by the Authority.
- c. Maintain financial records for the Event.
- d. Provide monthly and/or quarterly budget reports, as requested by the Authority.
- e. Review, approve and pay all Event invoices for which the selected contractor has primary oversight, including but not limited to contracts for parking, entertainment, exhibit set-up, computer and copying equipment, audio visual, soft seating, flowers, and transportation.

5. Event Planning & Logistics. The selected contractor will serve as the primary liaison to representatives of the Event venue and/or hotels throughout the course of the Event while simultaneously consulting with the Committee on all venue decisions. This includes but is not limited to:

- a. Assisting with agenda planning and session structure to ensure proper flow and seating logistics in order to create optimal learning and networking environments;

- b. Working with venue and outside service providers to provide carpeting, furniture, backdrops, staging, flowers & plants, pipe & drape, signage, etc.;
- c. Catering selection and oversight, ensuring best meals and breaks possible for participants, including taste testing of mainstream menu options, as well as vegetarian and other dietary restricted foods;
- d. Plan for any off-site events including hiring of caterer, ordering of tables, chairs, food, special meals, etc.;
- e. Arrangement of all decorating, audiovisual and room set-up requirements;
- f. Maintenance and oversight of guest room lists;
- g. Arrangement for and oversight of a master account for speaker and staff charges at the hotel;
- h. All pre-event liaison and follow-up with venue vendors;
- i. On-site liaison with the facility and all vendors during the Event;
- j. All post-event liaison and follow-up, including review of the venue invoice;
- k. Support the Committee as it develops program content to ensure full development in accordance with overall timelines;
- l. In consultation with the Committee, order basic items including but not limited to name badge stock, name badge holders, ribbons, lanyards, etc.
- m. If appropriate, the selected contractor will research, competitively bid, identify and negotiate contracts with outside vendors and sponsors. This may include but is not limited to graphic designers, printers, transportation services, venues for social events, parking, entertainment, exhibit set-up, computer and copying equipment, audio visual, soft seating, flowers, transportation and others required for the event.
- n. Develop and produce materials for the event such as registration brochures, programs, signage, etc. In consultation with the selected venue, obtain and arrange for the display of all appropriate on-site signs, markers, banners, etc., required for the event.
- o. Consult and work with the Committee to compose and edit text required for marketing materials (different from items outlined in “n” above); develop camera-ready copy and graphics with the assistance of graphic designers (if appropriate); arrange for the printing (if appropriate); distribution and electronic posting of materials. Note that Authority approval would be required during the development of and before releasing for print and posting. It is anticipated that a minimum of two marketing pieces would be developed for each Event.
- p. Work with the Committee to develop, design and write the on-site program and related materials, which may include the Event agenda, speaker information (e.g., biography) and materials, participant directory and any other information agreed to be appropriate.
- q. In collaboration with the Committee, design, layout and print coordination of, assembly of, and distribution on-site, as applicable to the Event, including but not limited to, tote bag, name badges, and “Save the Date” communications.
- r. If applicable, competitively bid, negotiate and contract with vendors to provide video-recording services at the event in accordance with specifications provided by the Committee.
- s. Website Management (as appropriate event to event). Design of a landing page for existing website, including development and linking of PDF of pre-registration brochure, development of and link to online registration form, and periodic revisions as appropriate. (Hosting fees should be addressed in the bids). Items may include but are not limited to:
 - i. Creation of and maintenance of online session proposal forms;

- ii. Creation and maintenance of online session manager site for input of sessions;
 - iii. Creation of speaker proposal form;
 - iv. Maintenance of speaker contact information online;
 - v. Development of registration form PDF;
 - vi. Development of registration brochure PDF;
 - vii. Maintenance of committee list online;
 - viii. Development and upload of Exhibitor/Sponsor packet online;
 - ix. Development of session handouts PDF;
 - x. Development of keynote speaker sessions online;
 - xi. Provision of award information online; and
 - xii. Development of "Past Conferences" information section online.
- t. Graphic Design Services (as appropriate event-to-event) in collaboration with the Committee.
- i. Pre-Registration Brochure. Design and layout of full-color pre-registration brochure including letterhead folder, etc., with print and mailing coordination.
 - ii. On-site Brochure. Design and layout of full-color brochure with modified cover adaptation of the pre-registration brochure.
 - iii. Advertisement Design. Each ad designed is anticipated to require an initial design fee with additional hours billed. Provide quote as part of the bid package.
 - iv. Letterhead/Envelopes Design. Design, print coordination.
 - v. Folder Design if requested by the committee. Design and layout of two-pocket, full-color folder, print coordination.
 - vi. BMCC Awards Booklet. Design, layout of 14-page, two-color, 5x11 brochure (including 2 sponsor ads), print coordination. NOTE: these specifications are for bid comparison purposes. The actual awards booklet may be longer or shorter, depending upon the actual number of awards.

6. Speaker & Sponsor Support.

- a. Work with the Committee to solicit sponsors and exhibitors for the Event, including development of sponsor and exhibitor benefit packages if appropriate. Develop a sponsor list and handle all mailings (electronic and hard-copy) to entire sponsor list.
- b. Follow-up pertaining to sponsorship commitments.
- c. Assist in collecting all contact information for panelists, moderators, keynotes and speakers ("Speakers") for all sessions from event-to-event.
- d. Establish and maintain an online session manager; coordinate and post Speaker handouts, biographies and contact information on website.
- e. Work with the Committee to confirm Speakers for the Event (anticipated is a minimum of 5 speakers). Serve as the primary liaison to the Speakers, confirming all details of their participation, including contracts with Speakers, Event registration, travel and lodging arrangements in accordance with pre-approved State of Michigan travel policy, honorariums, session titles and descriptions, disclosures, and obtaining all relevant releases, information and materials (e.g., biographies, hand-outs, audiovisual requirements, etc.), and all other logistical and programmatic arrangements. The Authority will provide guidelines with regard to an overall line item amount for fees and expenses for Speakers for each Event.

- f. Coordinate registration, reimbursement processes, complimentary registration forms, audiovisual requests, and logistical assistance to Speakers, etc. Follow-up with confirmation as appropriate, including any packets and information related to the Event.
- g. Serve as primary contact for Speakers etc., regarding their Event needs.
- h. Development of Sponsor PowerPoint Presentation for General Sessions including all project management, design, photo enhancement and production layout.
- i. Development of sponsorship packets, including design, layout, copywriting and sponsorship level breakdown.
- j. Following the conclusion of the Event, prepare and distribute thank-you letters to Speakers and sponsors, including results of evaluations, etc., as appropriate.

7. Reporting Requirements. The selected contractor will submit to the Authority the following written reports:

- a. Periodic written registration/status reports as requested by the Authority.
- b. No later than thirty (30) days after the Event, provide a final written report reconciling all revenues and expenses with the Event.
- c. Remit net proceeds within forty-five (45) calendar days after the close of the event.

8. Media & Public Relations. The selected contractor will support the Authority's communications staff in pre- and post-conference media relations, assisting with overall media relations and development of public relations materials (e.g., press releases, press kit, daily news, etc.), and handle media logistics.

9. Awards. From event-to-event, it may be necessary to provide for recognition of individuals or groups. The selected contractor will, in consultation with the Planning Committee, write the profile for the award(s) winner(s), including interviews of award recipient(s), writing and editing the award.

- a. Duvernay Award. Coordinate framing and engraving of the Duvernay Award. (Presented in memory of Terrence R. Duvernay, former MSHDA Executive Director, the Duvernay Award goes to a person who reflects both the ideals and personal qualities of Mr. Duvernay. The award recipient receives a painting of Mr. Duvernay from an artist commissioned by the Authority).

**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSALS**

EXHIBIT A

NOTICE TO BIDDERS

I. Bidder Qualifications/Requirements

Proposals not including requested information may be viewed by the Authority as non-responsive and not considered further. Bidders are strongly encouraged to review their proposals prior to submission to ensure that all requested information is included.

A. Bidder's Experience. The Authority has identified the following qualifications that it believes are necessary for the successful performance and completion of the services described in the Scope of Work. The Bidder must:

1. Have experience providing event and conference planning services; and
2. Assign experienced personnel to perform the services or have personnel supervised by experienced staff.

B. Company Background Information. The Bidder must provide answers to the following:

Legal business name and address.

[Name]
[Street Address]
[City, State, Zip]

Is your business authorized to conduct business in Michigan?

What State is your business incorporated in?

Phone number: _____

Website address: _____

Number of years in business and number of employees:

Legal business name of any applicable parent company and address (include any "Doing Business As" identifiers).

Has there been a recent change in the organizational structure (e.g., management team) or a change of control (merger or acquisition)? **(Y/N)**

If so, why and how has it affected the company? _____

Has your company ever been debarred, suspended, or otherwise disqualified from bidding, proposing, or contracting with any governmental entity, including the State? **(Y/N)**

If yes, provide the date, governmental entity, and details surrounding the action. _____

Has your company ever been sued by the State of Michigan? **(Y/N)**

If yes, provide the date, case caption, case number, and identify the court that the case was filed in. _____

Has your company ever sued the State of Michigan? **(Y/N)**

If yes, provide the date, case caption, case number, and identify court that case was filed in. _____

Within the past five (5) years, has your company defaulted on a government contract or been terminated for cause by any governmental entity, including the State? **(Y/N)**

If yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.

Within the past five (5) years, has your company defaulted on a contract or been terminated for cause by any private entity in which similar service or products were being provided by your company? **(Y/N)**

If yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default. _____

Does your company have experience working with the State of Michigan? **(Y/N)**

If so, please provide a list (including the contract number) of the contracts you hold or have held with the State for the last 10 years.

- C. Bidder's Authorized Signatory.** An official authorized to commit the Bidder to the terms and conditions of the proposal must sign the proposal being submitted. The Bidder must clearly identify the full title and authorization of the designated official and provide a statement of bid commitment with the accompanying signature of the official. Attach with the proposal any resolutions, bylaws, articles of incorporation showing authorization that the approved signatory has been approved to act on behalf of your business. Include the name and telephone number of person(s) in your organization authorized to expedite any proposed contract with the Authority.
- D. Bidder Organization Authorized to Transact Business in Michigan.** The Bidder must be either a Michigan entity (limited partnership, Limited Liability Company, for-profit corporation or non-profit corporation, etc.) or, if foreign, authorized to do business in the State of Michigan.

Proposals from Sole Proprietors Will Not be Accepted

Questions regarding specific requirements to transact business in the State of Michigan should be referred to or otherwise contact the Michigan Department of Licensing and Regulatory Affairs, Corporations, Securities & Commercial Licensing Bureau at:

http://www.michigan.gov/lara/0,4601,7-154-61343_35413---,00.html.

- E. Bidder's Minimum Internet/Technological Capabilities.** The Bidder must have phone, internet, and e-mail access. Internet and e-mail access must be adequate enough to allow the Bidder to receive, download and upload data, files and attachments from Authority staff. (Current state standards are limited to a functional size of 20 MB).
- F. Limits on Liability & Indemnification.** The Bidder must review and acknowledge that the Authority will require the Bidder to satisfy the following requirements prior to the execution of a contract with the Authority. If the Bidder has objections, please provide an explanation with your proposal outlining the objection.

If awarded a contract, the Bidder agrees to:

1. Indemnify, defend and hold harmless the Authority, its Board, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:
 - a. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from (1) the services provided ("Services") or (2) performance of the Services, duties, responsibilities, actions or omissions of the Bidder or any of its subcontractors under an awarded contract.
 - b. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from a breach by the Bidder of any representation or warranty made by the Bidder in an awarded contract.
 - c. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or related to occurrences that the Bidder is required to insure against as provided for in an awarded contract.
 - d. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from the death or bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with the performance of services by the Bidder, by any of its subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the Authority.

- e. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents which results from an act or omission of the Bidder or any of its subcontractors in its or their capacity as an employer of a person.
- f. any action or proceeding threatened or brought against the Authority to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service supplied by the Bidder or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United States or foreign patent, copyright, trade secret or other proprietary right of any person or entity, which right is enforceable under the laws of the United States.

G. Bidder's Insurance Coverage. The Bidder must maintain and provide evidence, satisfactory to the Authority, of the following minimum insurance coverage:

1. General Liability Insurance for \$1,000,000 with the Authority shown as additional insured;
2. Errors and Omissions Insurance for \$1,000,000 for each occurrence and \$1,000,000 annual aggregate;
3. Worker's Compensation Insurance (if required under state law). Any citing of a policy of insurance must include a listing of the States where that policy's coverage is applicable.
4. If required by the Authority, Cyber Security Insurance for \$1,000,000.

H. Project Personnel. Bids must acknowledge and identify project personnel who will be performing services pursuant to an awarded contract and (a) sign the contract on behalf of the selected contractor and/or (b) are listed in the form attached and incorporated into this RFP as Exhibit D.

II. Notifications to Bidders

A. Questions Regarding RFP. Questions raised by Bidders concerning the RFP must be submitted in writing via email.

- Address all questions regarding the RFP to the Authority's Procurement Office.
- Questions must be received in writing via email by Thursday, June 8, by 4:00 pm (Detroit, MI time).
- To ensure a fair and impartial process, the Authority's Procurement Office will *only* address on time and properly submitted questions.
- Phone calls involving the RFP or related questions will not be accepted.

- Firms submitting bids shall not contact any Board members or Authority staff.
- Submit questions using the subject line **Event Planner RFP** to the attention of:

**Michigan State Housing Development Authority
c/o Procurement Office**

E-mail: MSHDA-Procurement@michigan.gov

- The Authority will hold no other question sessions or bidder's conferences.
- Responses to properly submitted questions will be posted on or around June 14, 2017.
- All questions and answers related to this RFP will be supplied to Bidders that submitted questions, and/or to organizations providing the Procurement Office with notification of intent to submit a proposal.

B. Revisions to RFP. If, prior to the proposal deadline, the Authority deems it necessary to provide additional clarifying information, or to revise any part of the RFP, supplements or revisions will be provided to all Bidders who have indicated they will submit a proposal. Proposals will then be evaluated based on the terms and conditions of the RFP, any supplements or revisions to the RFP, and the answers to any written questions.

C. Michigan Freedom of Information Act. All documents submitted to the Authority are subject to the Michigan Freedom of Information Act ("FOIA"). In the event a request for submitted documents is made to the Authority, the Authority's FOIA Coordinator will redact or withhold information and/or documents that are exempt from disclosure under FOIA. See *MCL 15.243 et seq.* Please note that any requests by non-MSHDA personnel to review proposals will be denied until the deadline for submission of the bids has expired. See *MCL 15.243(1)(i)*.

Please submit FOIA requests to the Authority as follows:

**MSHDA FOIA Coordinator
c/o Legal Affairs**

Email: MSHDA-FOIA@michigan.gov

D. Payments to Pensioned Retirees. 2007 PA 95, MCL 38.68c requires retirees of the State Employees Retirement System ("Pensioned Retirees") who become employed by the State either directly or indirectly through a contractual arrangement with another party on or after October 1, 2007 to forfeit their respective state pensions for the duration of their reemployment. **Accordingly, any pensioned retiree who provides or renders services pursuant to the contract for which bids will be made under this RFP shall be required to forfeit his or her pension during the term of the contract.**

Proposals must acknowledge and confirm whether pensioned retirees will render services under the contract being sought through this RFP. If the Bidder intends to use a pensioned retiree, the Bidder must submit written confirmation from the pensioned retiree that he or she agrees to forfeit his or her pension during the term of the contract, if awarded. If awarded a contract, the Bidder must submit a copy of the pensioned retiree's directions to the State of Michigan's Office of Retirement Services ("ORS") to withhold the retiree's pension payments until the end of the contract term by having the pensioned retiree complete a Retiree Rehire Certificate. A copy of the Retiree Rehire Certificate will be required to be submitted prior to executing an awarded contract.

- E. Contract Award Approvals.** Prior to executing an awarded contract, the Authority must seek and obtain Michigan Civil Service approval. The required forms will be submitted to Civil Service prior to the Authority's Board approval.

Contracts that equal or exceed \$45,000 must be approved by the Authority's Board. Thereafter, an awarded contract will be forwarded to the selected Bidder with instructions to review, sign, and return two "originals". Upon receiving the signed "originals", the Authority's Procurement Office will submit the signed "originals" to a duly authorized signatory for final execution on behalf of the Authority. One fully executed "original" will then be returned to the selected contractor.

- F. Applicable Laws.** The selected contractor will be required to comply with all Michigan and federal laws, as well as acquire any permits or permission-related documents to provide services being sought.

- G. Submissions Subsequent to Award.** As part of an awarded contract, the selected contractor will be required to review and provide and/or acknowledge additional documents including but not limited to:

- Certifications Regarding Debarment, Suspension and Other Responsibility Matters form.
- W-9 Request for Taxpayer Identification Number and Certification.
- Retiree Rehire Certificate.

**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSAL**

EXHIBIT B

PROPOSAL SUBMISSION

I. Submitting Proposal

- Bidders wishing to submit proposals must submit one (1) **.pdf** copy of a proposal to provide the services described in the Scope of Work.
- Submitted proposals must respond to and address the tasks, activities, listed requirements and questions outlined in the Scope of Work of this RFP and its attached and incorporated exhibits.
- The Authority shall not be liable for any costs that a Bidder may incur while preparing a proposal.
- The Authority shall not be liable for any costs that a Bidder may incur prior to the complete execution of a contract.
- If the Authority enters into a contract, the Authority's consideration (payment) shall be limited to the term of the contract.

II. Proposal Delivery

A. Due Date. Proposals responding to this RFP are due **Monday, June 26, at 4 p.m.** (Detroit, MI Time).

A. Originals and Copies. Submit one .pdf version of a proposal via email outlining how the Bidder will provide the services described in the Scope of Work.

B. Delivery of Proposal. Direct all deliveries to:

MSHDA-Procurement@michigan.gov

Confirmation of Delivery. The Procurement Office will verify receipt of email and proposal to the Bidder within 24 hours. If Bidder has not received verification, the Bidder should verify the email address provided above (i.e., no spaces; hyphen between “MSHDA” and “Procurement”) and resubmit an email asking for verification.

C. Commencement of Work. Project work shall not commence until execution of a project contract. The selected contractor shall not proceed with performance of the project work or incurring of project costs until both parties have signed the project contract to show acceptance of its terms and conditions.

D. Project Control. The selected contractor will carry out this project under the direction and control of the Authority and its designated Contract Administrator.

E. Quarterly Progress Reports. The selected contractor may be required to submit brief written quarterly summaries of progress outlining the work accomplished during the

reporting period. Problems, real and anticipated, or any significant deviation from the agreed-upon work plan should be brought to the attention of the Contract Administrator. A financial report of expenditures to date including any changes to approved budget or approved work schedule must be submitted as part of the report. If required, these reports will be due to the Authority each January 15, April 15, July 15 and September 15 during the project period.

- F. Final Project Summary Report.** The selected contractor may be required to submit a narrative summary of the project and its outcome. This should include an outline of the methodology used, evaluation of the project results, and a summary of what worked and what the selected contractor would do differently the next time the contractor undertakes a project of this nature. If required, one printed copy of the final summary report and an electronic version of the report in shall be submitted to the Authority.

III. Selection of Proposal

The selection of a proposal shall be subject to a review by the Authority's Legal Affairs Division concerning conflicts of interest and/or participation in Authority programs by the Bidder, its officers, employees, subcontractors or independent contractors.

The Authority will select the proposal based on a two-phase selection process. Phase 1 consists of an evaluation of proposals measured against Selection Criteria provided below. Phase 2 consists of a short presentation and interview with an Authority Evaluation Committee. To proceed to Phase 2 of evaluation, a Bidder must accumulate a minimal threshold score of 75 points.

A. Phase 1 Selection Criteria.

1. Experience in planning events and conferences including related education or certification (10 Points)
2. Breadth and variety of planning experience incorporating traditional and non-traditional planning strategies applicable to the Events presented in this RFP. Specifically:
 - a. Experience planning multiple events for same agency with varying programmatic requirements (15 Points)
 - b. Experience with simultaneous planning events of differing sizes, differing purpose (15 Points)
 - c. Demonstrable ability to flexibly use traditional and electronic technologies and platforms to effectuate a successful event (15 Points)
3. Communication skills, including clarity of proposal, fully addressing how the Bidder will provide coordination of each specific Event as provided in this RFP, including clarity of costs per service provided on an event-to-event basis (15 Points)

4. Adequacy of proposed methodology, staffing, and time frames for performing services for all potential events to be planned (20 Points)
5. Overall cost of services broken down by Event (10 Points)

Total Possible Points:

100 Points

B. Phase 2 Selection. Proposals receiving 75 or more evaluation points from Phase 1 will have its pricing evaluated and considered further for award. Bidders will be scheduled to provide the Authority's Evaluation Committee with a 15-minute presentation followed by a Question and Answer (i.e., "interview") period. It is anticipated that the presentation and interview will last for approximately 1-hour.

NOTE: The Authority may utilize all proposals, including pricing information, without regard to a proposal's technical score to determine fair market value, when comparing and negotiating prices. The Authority is not obligated to accept the lowest price proposal. The price proposal evaluation includes consideration of a qualified service-disabled veteran preference. Information related to qualified service-disabled veteran preference is located at <http://michigan.gov/micontractconnect/0,4541,7-225-48677-123519--,00.html>.

C. Proposal Selection. The Authority's review may take up to four weeks after the closing date for submitting proposals. The Authority anticipates notifying the selected contractor on or about July 26, 2017, via e-mail and posting on the Authority's website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and the Authority's Board.

D. 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. If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals. Reasons for canceling the selected proposal may include, but are not limited to, the following:

1. Refusal of Department of Civil Service to process required forms.
2. Refusal of duly authorized Authority signatory to execute the contract.

**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSAL**

EXHIBIT C

PROPOSAL FORMAT

I. Overview

- Proposals must be submitted in the format described in this Exhibit C as outlined below.
- There should be no attachments, enclosures or exhibits other than those considered by the Bidder to be essential to convey to the Authority a complete understanding of the proposal.
- Each section must be clearly identified with appropriate headings and/or table of contents.
- The proposal should be clear, accurate, and complete, with sufficient detail to enable the Authority to evaluate the services and methods proposed.

II. Headers/Table of Contents

A. Business Organization. Include the following information and supporting documentation as outlined here and above (see also pp. 9-10):

1. The full name and address of Bidder, including any "Doing Business As" titles.
2. The branch office or name and address of registered agent, if applicable.
3. The type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company, foreign). Note that the selected contractor will be required to provide proof of authorization to conduct business in the State of Michigan.

B. Management and Personnel. Answer/Address the following:

1. **Officer and Management Summary.** Identify managers and/or officers who will manage the contract if it is awarded and provide their resumes or CVs. Identify officers and managers by name and position. List their responsibilities and the specific tasks each officer and manager assigned to the project will carry out and the anticipated time frames for each task. Provide current contact information including the manager(s) and/or officer(s) name, title, mailing address, email address, and phone and fax numbers.
2. **Personnel Summary.** Identify proposed key project personnel, including job titles, responsible for performing the activities and services described in the Scope of Work.

3. **Submit a Certificate Verifying Project Personnel.** The form is found in Exhibit D, attached and incorporated into this RFP.
 - a. **Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan.** Review Exhibit A, Section II.D above for important information regarding Pensioned Retirees.

C. Experience.

1. **Prior Experience of Bidder.** Indicate **at least 3 relevant experiences**, of at least the same size and scope as this RFP, from the **last 5 years** supporting your ability to successfully manage a contract of similar size and scope for the work described in this RFP. Include sufficient detail to demonstrate the relevance of such experience. Include descriptions of qualifying experience, including project descriptions, costs, and starting and ending dates of projects successfully completed. Also include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
2. **Experience of Proposed Personnel Assigned to Provide Services.** The proposal should describe the education and experience of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel.
3. **Examples of Work.** Provide examples of planning services that reflect the versatility of your business in planning multiple events for the same agency with differing goals, events using different technologies and planning approaches, as well as simultaneously planning events of differing size. Examples could include sample publications, website screen shots, survey results, etc., etc.
4. **Professional References.** Include professional references who can provide information regarding the Bidder's prior past performance.
5. **Additional Information and Comments.** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

D. Proposed Services.

1. **How Services Will be Rendered.** Address and describe the process used to render the services and how the services will be rendered. This should be an overview of the methodology to be used, based on staff and time frames, to meet the project scope of work and complete the required services within the time frame of the project.
2. **Use of Subcontractors.** If any work will be subcontracted, describe the following:
 - a. Work that will be subcontracted.
 - b. The process used to select the subcontractors.
 - c. The subcontractor's experience and expertise.
 - d. The names of the firms/individual(s) who will perform the subcontracted work.

- e. How quality of service will be monitored and ensured.
3. **Standards.** Describe or address the following:
- a. The standards that the services will satisfy. (If standards of a professional association will be followed, identify the standards and the association. Alternatively, include best practices are described as part of undergraduate and/or graduate degree-programs, etc.)
 - b. How quality of service will be monitored and ensured.
 - c. Identify and indicate whether "best practices" will be followed. (If applicable, identify the organization and/or document establishing such standards.)
4. **Security of Data.** If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:
- a. Has your organization established and used a policy to address the security of paper and electronic data? (***Please do not submit a copy of your security policy.***)
 - b. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your firm's policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)
5. **Copyrighted Materials.** Acknowledge and/or confirm the following:
- a. You agree that any and all products produced as a result of this contract shall be the property of the Authority.
 - b. You agree that the Authority shall (a) hold a copyright on all materials or products produced under the contract and (b) be allowed to file for a copyright with the United States Copyright Office.
 - c. You acknowledge that submitted documents will not contain in part or whole copyrighted materials.

E. Price Proposal & Budget

1. **Price Proposal.** All rates quoted in proposals submitted in response to this RFP will be a firm fixed price for the duration of the contract. No price changes will be permitted. (***Note that proposals should reflect State of Michigan per diem rates in effect at the time of proposal submission. State per diem rates are subject to change during the term of an awarded. They can be found at [http://www.michigan.gov/documents/dtmb/Travel_Rates_FY17_January 2017 547101 7.pdf](http://www.michigan.gov/documents/dtmb/Travel_Rates_FY17_January_2017_547101_7.pdf).***)
2. **Budget.** Include in the proposal a line item budget identifying all expenses related to the work to be performed. By submitting the bid, the Bidder 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 event-by-event:

- a. Staff costs broken down by each individual staff person. Include # of hours, per hour rate, and work assignment.
- b. Lodging costs (based on State of Michigan per diem rates). Description should include when and why lodging is needed.
- c. Meal costs (based on State of Michigan per diem rates). Description should include when and why meals are needed.
- d. Transportation costs (standard State of Michigan mileage rate is \$0.36 per mile). Description should include type and reason for transportation cost.
- e. Costs of supplies and materials. Description should include items to be purchased and reason for purchase.
- f. Other direct costs. Description should include items to be purchased and reason for purchase.
- g. Total budget.

F. Schedule/Timeline. Bids must include a schedule for delivery of services set forth in the Scope of Work and cite the proposed deadlines for completing the tasks within the Scope of Work event-by-event.

Include a timetable indicating how the project will be scheduled. The timetable should include: (1) any proposed meetings; (2) dates for draft submittals; (3) review times (allow 4 weeks for Authority review) and completion dates for deliverables; (4) quarterly reports (these will be due July 15, Sept. 15, Jan. 15, and April 15 each year during the project reporting period); and (5) final Project Completion Report. A suggested schedule/timeline table is provided below:

Completed Service/Project Components	Estimated Completion Dates
(Using Scope of Work, Bidder should insert tasks and activities to be completed)	(Bidder should insert estimated deadlines)

G. Disclosure of Participation and Interests in Authority Programs.

- 1. Disclosure of Interests in Authority Programs.** Authority programs include, but are not limited to, the Housing Voucher Program, any loans where the Authority is the lender, and any grants made by or administered by the Authority.
- 2. Submission of Conflicts of Interests.** Submit a list of all interests that the Bidder, its officers, board members, and employees respectively have in Authority programs. If the Bidder intends to use independent contractors or subcontractors to render services, include the interests that independent contractors or subcontractors and their officers, board members, and employees respectively have in Authority programs.
- 3. Potential Conflicts of Interests.** Indicate in the proposal whether the Bidder is currently under contract and/or has been awarded a grant from the Authority. Please confirm whether any potential conflict of interest will exist if the Authority enters into a contract with the Bidder.

Potential conflicts of interest may arise from the Bidder's officers, employees, members, board members, independent contractors or subcontractors the Bidder will use to render services if the firm enters into a contract with the Authority.

If the Bidder is currently under contract or is receiving a grant from the Authority, indicate if the Bidder or project personnel holds a position with another entity that may be under contract or receiving a grant from the Authority.

Include an organizational chart from each entity under contract or awarded a grant from the Authority in which the Bidder or project personnel holds a position. Include each employee's position and title within the entity. In addition, indicate whether the Bidder or the project personnel is responsible for making financial decisions in his/her capacity and what measures have been implemented to ensure that funds are not comingled.

THE STATE RESERVES THE RIGHT TO DEEM A BID NON-RESPONSIVE FOR FAILURE TO DISCLOSE A POTENTIAL CONFLICT OF INTEREST.

- 4. Family Members Who Work for Authority.** Please list the names of the Bidder's officers, board members, and employees who have family members who work for the Authority and the names of the family members who work for the Authority.

H. Signature Clause to be Signed by Bidder's Authorized Signatory. Insert into the proposal and have the authorized signatory sign the following signature clause at the end of the proposal:

I confirm that I have submitted this proposal on behalf of

_____ in response to the Michigan State Housing Development Authority's Request for Proposals for a Conference/Event Planner.

I also confirm that I have read and understand the Authority's indemnification, copyright, data security and insurance requirements.

By: _____

Role: _____

Date: _____



**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSAL**

EXHIBIT D

PROJECT PERSONNEL

See appended document titled

CERTIFICATE VERIFYING PROJECT PERSONNEL

**CERTIFICATE VERIFYING PROJECT PERSONNEL OF THE
CONTRACTOR/SUBCONTRACTOR**

The Contractor/Subcontractor acknowledges that the following personnel are Project Personnel of the Contractor/Subcontractor:

(1) Name _____
(Print or type name above line)

Title with Contractor/Subcontractor _____

Is this person a retiree who receives a pension from the Michigan State Employees Retirement System? Yes _____/No _____

(2) Name _____
(Print or type name above line)

Title with Contractor/Subcontractor _____

Is the person a retiree who receives a pension from the Michigan State Employees Retirement System? Yes _____/No _____

(3) Name _____
(Print or type name above line)

Title with Contractor/Subcontractor _____

Is the person a retiree who receives a pension from the Michigan State Employees Retirement System? Yes _____/No _____

Name of Signatory for Contractor/Subcontractor:

Printed Name: _____
(Print or type name above line)

Its: _____

Signature: _____

Federal Identification Number: _____

Pensioned Retirees (2007, MCL 38.68) (12/7/07 Rev)