



## REQUEST FOR PROPOSALS

DATE OF ISSUE:     October 24, 2018

TO:                    Potential Providers of Services

RE:                    **Request for Proposals (“RFP”) for Rent Comparability Studies (RCS) Appraisal Review Services for HUD Section 8 contract rents**

### Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	October 30, 2018	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	November 1, 2018	
Proposal deadline:	November 8, 2018	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	January 1, 2019	

### I. Services Sought by Authority

The Asset Management Division of the Michigan State Housing Development Authority (“Authority”) seeks an organization authorized to do business in Michigan to perform appraisal review services due to submission of Rent Comparability Studies submitted for expiring, renewing, or mid-term rent increase request of Section 8 contract rents.

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.

It is anticipated that a minimum three-year contract may be awarded.

### II. Contents of this RFP

- Overview of services sought, service requirements (“Scope of Work”)
- Exhibit A – Notices to Bidders
- Exhibit B – Submission & Selection
- Exhibit C – Proposal Format
- Exhibit D – Project Personnel Form

### III. Overview

- A. The Authority seeks appraisal review services to assist with the review of Rent Comparability Studies. The service will help/enable staff by providing review of RCSs submitted as a result of HUD Section 8 Contract Rent Renewal/Adjustment/Contract Expiration. The service will enable the Authority to meet its responsibilities as HUD's contract administrator.
- B. The requested services will assist both the Authority's CORE and Paid-Off Section 8 portfolios. Paid-Off means properties remain in the Authority's Section 8 portfolio but have paid-off any Authority provided mortgage.
- C. The Authority also seeks appraisal review services (similar to Rent Comparability Studies) for other projects the Authority is involved with that are not part of the Paid-Off Section 8 portfolio.

### IV. Service Requirements

- A. **Objectives.** To successfully perform the services described in Section III above, the selected contractor must:
  - 1. Review submitted RCS's for compliance with HUD Requirements per Chapter 9 of the Section 8 Renewal Policy Guidelines.
  - 2. Perform RCS desk reviews within established Authority timeframes.
  - 3. Be licensed to perform such reviews.
  - 4. Perform these reviews within Uniform Standards of Professional Appraisal Practice ("USPAP") requirements.

*The Appraiser must sign and take full responsibility for the report, but appraisal assistants may contribute to any of the tasks if: 1) they are employed by the same firm as the appraiser; and 2) the report identifies the roles the assistant appraiser performed.*

- B. **Tasks & Activities.** To achieve the objectives described in Section A above, the selected contractor must:
  - 1. Perform review of Rent Comparability as forwarded by Authority staff.
  - 2. Perform these reviews within established Authority timeframes.
  - 3. Perform these reviews for compliance with HUD Requirements per Chapter 9 of the Section 8 Renewal Policy Guidelines.
  - 4. Complete review of the RCS per the attached Authority checklist.
  - 5. Maintain appropriate staff to complete reviews within timeframes established by the Authority.
  - 6. Be licensed to perform Appraisal Reviews within the State of Michigan.
  - 7. Perform these reviews within USPAP requirements.

8. Provide training for owners/agents regarding the completion and submission of RCSs.
9. Handle owner/agent RCS appeal process according to Chapter 9 of the Section 8 Renewal Policy Guidelines.
10. Communicate RCS results with HUD and provide necessary backup documentation to support recommendations.
11. Perform reviews of appraisals of other projects that are not part of the Paid-Off Section 8 portfolio, as forwarded by Authority staff. These projects include low income housing tax credit properties submitting Qualified Contract Requests under Section 42 of the Internal Revenue Code of 1986, as amended.

**C. Service Deadlines.**

As established below.

**V. Standards for Performance**

The selected contractor shall perform the tasks & activities in accordance with the following standards:

- A. Review each RCS per HUD Requirements in Chapter 9 of the Section 8 Renewal Policy Guidelines and adhere to Authority-established timeframes as outlined below:
  1. If the RCS is **not complete**, contact the owner's appraiser with any questions, issues, concerns, clarifications within seven (7) calendar days of the receipt of the RCS.
  2. If the RCS is **complete**, the review of the rent comparability study is due to the Authority within fourteen (14) calendar days of the date that a complete RCS is received in the Authority office.
  3. Once the reviewer has completed their review they should communicate their results to the Authority immediately.
    - a. If the reviewer agrees with the appraiser's market rent conclusions, the reviewer should document that agreement in their desk review and forward a copy of the desk review to the Authority, and provide a table listing the concluded market rents for each Section 8 unit type.
    - b. If aspects of the RCS are unclear or unconvincing, the reviewer should ask the appraiser for additional information or explanations. If the issues are minor and the reviewer expects an easy resolution, the reviewer may call the appraiser. If concerns are many, more significant or complicated, the reviewer should send the appraiser an email / fax/ hard copy letter stating the concerns and giving the appraiser seven (7) calendar days to respond. The reviewer must copy the owner/agent on any written correspondence. The RCS appraiser should send the information back to the reviewer and copy the Authority and the owner/agent.
    - c. If the appraiser's response does not resolve the reviewer's concern, the reviewer should talk with or write the appraiser/owner a second time. Again,

the reviewer must copy the owner contact on any written correspondence. Please respond to the owner's appraiser within ten (10) calendar days of receipt of response, with a copy of the response to the owner and the Authority.

- d. Within ten (10) calendar days after final information is received from the owner/appraiser, the reviewer must either: 1) accept the RCS; or 2) draft a decision letter challenging the RCS. This letter or email will be sent to the Authority.
- e. If the reviewer challenges the RCS, the decision letter must clearly state the reasons the RCS is challenged. If possible, the RCS reviewer should provide alternate rents that can be offered to the owner. Any alternate rents must be developed by the reviewer and be consistent with Chapter 9 of the Section 8 Renewal Policy Guidebook's procedures and USPAP. The letter must indicate how the reviewer arrived at the suggested market rent.

**NOTE:** The reviewer must copy the Authority on all communications with the appraiser and/or owner/agent. If communication was made by telephone, the reviewer must inform the Authority by email of the date of the call and what was discussed.

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

**EXHIBIT A**

**NOTICE TO BIDDERS**

**I. Notifications to Bidders**

- A. 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.
- B. 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](http://www.michigan.gov/lara/0,4601,7-154-61343_35413---,00.html).

- C. Minimum Internet/Technological Capabilities.** The Bidder must have phone, internet, and e-mail access. Internet and e-mail access must be adequate 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).
- D. 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.

**E. 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](mailto:MSHDA-FOIA@michigan.gov)**

**F. 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:

- W-9 Request for Taxpayer Identification Number and Certification.
- Proof of proper insurance coverage.
- Retiree Rehire Certificate, if necessary.

**G. 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. 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.

**I. 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 and sign it. Upon receiving the signed contract, the Authority's Procurement Office will submit the contract to a duly authorized signatory for final execution on behalf of the Authority. One fully executed contract will then be returned to the selected contractor.

- J. 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.
- K. Project Control.** The selected contractor will carry out this project under the direction and control of the Authority and its designated Contract Administrator.
- L. 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.

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

**EXHIBIT B**

**SUBMISSION & SELECTION**

**I. Submission of Questions**

- 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.
- 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.

**A. Due Date.** Submit all questions regarding the RFP via email by **October 30, 2018** at **4 p.m.** Eastern Time (Detroit). Submissions received at 4:01 p.m. are considered late and will not be considered further.

Responses to properly submitted questions will be posted on or around **November 1, 2018**. The Authority will hold no other question sessions or bidder's conferences.

**B. Delivery of Proposal.** Address questions using the subject line **RCS Review Services RFP** to:

**MSHDA-Procurement@michigan.gov**

*Confirmation of Delivery.* The Procurement Office will verify receipt of email and questions 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.

**II. Submission of Proposal**

- 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.

- A. Due Date.** Proposals responding to this RFP are due **November 8, 2018 at 4 p.m.** Eastern Time (Detroit). Submissions received at 4:01 p.m. are considered late and will not be considered further.
- B. Originals and Copies.** Submit **one (1) .pdf** version of a proposal via email outlining how the Bidder will provide the activities / services described in the Scope of Work.
- C. 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 and resubmit an email asking for verification.

**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.

- A. Selection Criteria.** The Authority will select the proposal based on Selection Criteria listed below:

1.	Experience, education or certification	(40 Points)
2.	Communication skills, including clarity of proposal and writing sample	(10 Points)
4.	Adequacy of proposed methodology, staffing, and time frames for performing services	(30 Points)
4.	<u>Reasonableness and feasibility of fee</u>	<u>(20 Points)</u>

**Total Possible Points: 100 Points**

*Note:* The Authority will utilize all Bidder information to determine the best value for the services sought, and is not obligated to accept the lowest price proposal.

- B. 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 December 13, 2018 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.
- 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. 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 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 and Contents**

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. Company Background Information.**

1. Legal business name and address.  
[Name]  
[Street Address]  
[City, State, Zip]  
[Phone Number]  
[Website address]
2. The type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company, foreign).  
*Note:* Prior to contract execution, the selected contractor will be required to provide proof of authorization to conduct business in the State of Michigan.
3. Any applicable “Doing Business As” names.
4. Any branch office, or name and address of registered agent, if applicable.
5. Legal business name of any applicable parent company, and its address.
6. State your business is incorporated in.
7. Number of years in business and number of employees.

8. Has there been a recent change in the organizational structure (e.g., management team) or a change of control (merger or acquisition)?  
(Yes / No)  
If Yes, why and how has it affected your company?
9. Does your company have experience working with the State of Michigan?  
(Yes / No)  
If Yes, please provide a list (including the contract number) of the contracts you hold or have held with the State for the last five (5) years.
10. Has your company ever been debarred, suspended, or otherwise disqualified from bidding, proposing, or contracting with any governmental entity, including the State?  
(Yes / No)  
If Yes, provide the date, governmental entity, and details surrounding the action.
11. Has your company ever been sued by the State of Michigan?  
(Yes / No)  
If Yes, provide the date, case caption, case number, and identify the court that the case was filed in.
12. Has your company ever sued the State of Michigan?  
(Yes /No)  
If Yes, provide the date, case caption, case number, and identify court that case was filed in.
13. 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?  
(Yes / No)  
If Yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.
14. 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?  
(Yes / No)  
If Yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.

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

1. **Authorized Signatory.** The Bidder must clearly identify the name and title of an official authorized to commit the Bidder to the terms and conditions of the proposal.
  - a. Provide any resolution(s) authorizing the designated official as an approved signatory.
  - b. Proposal must include the statement of bid commitment, see Section H below, signed by the approved signatory.
2. **Officer and Management Summary.** Identify manager(s) and/or officer(s) who will manage the contract if it is awarded:

- a. Provide current contact information including the manager/officer name, title, mailing address, email address, and phone and fax numbers.
  - b. Provide their resumes or CVs.
  - c. List their responsibilities and the specific tasks each assigned officer/manager will carry out and the anticipated time frames for each task.
3. **Personnel Summary.** Identify proposed key project personnel, including job titles, responsible for performing the activities / services described in the Scope of Work.
4. **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 I.I above for important information regarding Pensioned Retirees.

### C. Experience.

1. **Prior Experience of Bidder.** Indicate prior experience of your organization that you consider relevant to the successful accomplishment of the project described in this RFP.
  - a. Include sufficient detail to demonstrate the relevance of such experience.
  - b. Include descriptions of qualifying experience, including project descriptions, costs, and start/end dates of projects successfully completed.
  - c. Include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
  - d. 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:
    - i. Have at least five (5) years' experience in performing appraisal review services;
    - ii. Be licensed to perform such reviews;
    - iii. Perform these reviews within Uniform Standards of Professional Appraisal Practice ("USPAP") requirements;
    - iv. Have experienced personnel to perform the services, or have personnel supervised by experienced staff.
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.** The following example of recent work shall be submitted with the Bidder's proposal:
  - a. None Required
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.

*The Appraiser must sign and take full responsibility for the report, but appraisal assistants may contribute to any of the tasks if: 1) they are employed by the same firm as the appraiser; and 2) the report identifies the roles the assistant appraiser performed.*

3. **Standards.** Describe or address the following:
  - a. The appraisal services requested in this RFP must satisfy the U.S. Department of Housing and Urban Development (HUD) requirements and the Uniform Standards of Professional Appraisal Practice (USPAP).
    - i. A copy of the USPAP is available online at: <http://www.uspap.org>
    - ii. A copy of the HUD Section 8 Renewal Policy Guidebook (Chapter 9) is available online at:  
[http://portal.hud.gov/hudportal/HUD?src=/program\\_offices/housing/mfh/mfhsec8](http://portal.hud.gov/hudportal/HUD?src=/program_offices/housing/mfh/mfhsec8)
  - b. How quality of service will be monitored and ensured.
  - c. 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?  
(Yes / No)  
If No, explain how your organization addresses the security of paper and electronic data.  
*(Note: 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?)  
(Yes / No)  
If No, explain how your organization handles confidential and/or personal data.
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.

*For reference: The Authority anticipates completion of 35 RCSs during 2018.*

- 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:

- 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 (based on standard State of Michigan mileage rate). 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.** Bidder must meet the predetermined timeline for the services as outlined below:

<b><i>Project Task</i></b>	<b><i>Action and Timeline</i></b>
<i>Incomplete RCS</i>	Contact the owner's appraiser with any questions, issues, concerns, clarifications within seven (7) calendar days of the receipt of the RCS.
<i>Complete RCS</i>	Review of the RCS is due to the Authority within fourteen (14) calendar days of the date that the complete RCS is received in the Authority's office.
<i>Post Review</i>	See Scope of Work Section V.A.3 (Standards for Performance) above for specific reviewer tasks and timelines.

**G. Disclosures.**

- 1. **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.

- a. Does the Bidder, its officers, board members, and employees respectively, have any interests in Authority programs?  
(Yes / No)  
If Yes, please provide their name, title, and the Authority program for which the interests exist.
- b. If the Bidder intends to use independent contractors or subcontractors to render services, do the independent contractors or subcontractors and their officers, board members, and employees respectively, have any interests in Authority programs?  
(Yes / No)  
If Yes, please provide their name, title, and the Authority program for which the interests exist.

**2. Potential Conflicts of Interests.** 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 organization enters into a contract with the Authority.

- a. Is the Bidder currently under contract and/or been awarded a grant from the Authority?  
(Yes / No)  
If Yes, please confirm whether any potential conflict of interest will exist if the Authority enters into a contract with the Bidder.
- b. Does the Bidder, its officers, board members, and employees, hold a position with another entity that may be under contract or receiving a grant from the Authority?  
(Yes / No)  
If Yes, 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 AUTHORITY RESERVES THE RIGHT TO DEEM A BID NON-RESPONSIVE FOR FAILURE TO DISCLOSE A POTENTIAL CONFLICT OF INTEREST.**

**3. Family Members Who Work for Authority.**

- a. Does the Bidder, its officers, board members, and employees respectively, have family members who work for the Authority?  
(Yes / No)  
If Yes, please provide their name and the name of the family member currently employed at 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:

**In response to the Michigan State Housing Development Authority's Request for Proposals for CORE and Paid-Off RCS Review Services, I confirm that I have submitted this proposal on behalf of**

\_\_\_\_\_  
<Company>

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

By: \_\_\_\_\_

Its: \_\_\_\_\_

Date: \_\_\_\_\_

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

**EXHIBIT D**

**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)