



REQUEST FOR PROPOSALS

DATE OF ISSUE: September 6, 2016

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) to Provide Case Management & Wrap-Around Services to Current and Incoming Family Self-Sufficiency Participants**

I. Services Sought by Authority

The Michigan State Housing Development Authority Rental Assistance and Homeless Solutions Division (“the Authority”) is seeking independent contractors to provide case management and wrap-around services to current and incoming Family Self-Sufficiency (FSS) participants.

Funded by the United States Department of Housing and Urban Development, the Authority manages the Housing Choice Voucher (HCV) Program in all 83 Michigan counties. Participation in the FSS program is voluntary and offered to all Authority HCV participants in the represented areas.

Bidders must identify in their proposals what county or counties they are interested in serving.

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
- Exhibit E – Performance Measures
- Exhibit F – Regions Map

* Note the additional attachment posted with this RFP on Buy4Michigan entitled “FSS Guidelines” for your reference.

III. Key Dates

- **September 16, 2016 – RFP Posted**
- **Questions due September 23, 2016.**
- **Answers posted September 26, 2016.**
- **Bids due October 13, 2016.**
- **Final approval of selections on or about October 26, 2016.**

IV. Overview

- A. The Michigan State Housing Development Authority Rental Assistance and Homeless Solutions Division (“the Authority”) is seeking independent contractors to provide case management and wrap-around services to current and incoming Family Self-Sufficiency (FSS) participants.
- B. The Authority manages the Housing Choice Voucher (HCV) Program in all 83 Michigan counties. Participation in the FSS program is voluntary and offered to all Authority HCV participants in the represented areas.
- C. The FSS and HCV Programs are funded by the United States Department of Housing and Urban Development (HUD). The continuation of these programs is based on available funding and adherence to Federal requirements for the proper management of these programs.

V. Objectives, Tasks & Activities, and Deadlines

- A. **Objectives.** To successfully perform the services described in Section I above, the selected independent contractor must satisfy the following objectives:
 - 1. Provide case management and wrap-around services to the FSS Head of Household (HOH) and other participating adult household members.
 - 2. Complete an Individual Training and Services Plan (ITSP), as required by HUD, for each participating adult household member enrolled in the FSS Program.
 - 3. Assist the participating adult household member(s) in completing HUD and Authority requirements for successful completion of the FSS Program.
- B. **Activities/Responsibilities Necessary to Complete Scope of Work.** To achieve the objectives, the selected independent contractor must perform the following activities/tasks:
 - 1. **FSS Program Contract of Participation (HUD-52650; “FSS Program Contract”) Enrollment**
 - a. The Authority FSS staff will provide the selected independent contractor with a copy of the FSS participant’s enrollment packet consisting of the: executed FSS Program Contract between the Authority and the FSS participant, Certification of Income (FSS-107), and the original FSS Application (FSS-322).
 - b. The selected independent contractor must contact the FSS participant to schedule the initial briefing.
 - i. Contact can be made by phone, letter on their agency letterhead, or the Briefing 1st Notice (FSS-1634).

- ii. All contact attempts must be documented in case notes.
- c. The initial briefing must be scheduled and conducted within 45 calendar days of receiving the FSS participant's enrollment packet.
 - i. If the FSS participant fails to respond to the initial briefing after two attempts, the selected independent contract will mail the FSS Participant Case Closure-10 Day Notice (FSS-96a).
 - ii. If the FSS participant fails to respond within 10 calendar days, the FSS Participant Case Closure (FSS-96b) will be completed and sent to the Authority's FSS staff to complete the termination process.
- d. Conduct the initial briefing.
 - i. Outline for the FSS participant the requirements for graduation:
 - Completed ITSP;
 - Completion of Financial Capability classes in the first 12 months of the contract;
 - Employed in the final 12 months of the FSS Program Contract; and
 - No family member residing with the FSS participant receiving the benefit of the HCV Program can receive Temporary Aid to Needy Families (TANF) cash assistance in the final 12 months of the FSS Program Contract.
 - ii. Initiate the completion of the following forms by the FSS participant and forward them to the Authority's FSS staff:
 - Briefing Summary (FSS-145);
 - ITSP (FSS-325);
 - Financial Capability Referral (FSS-101);
 - *Key to Own* Program Participation Confirmation (HO-204)

2. Required Actions During the FSS Program Contract

- a. For the duration of the FSS Program Contract, the selected independent contractor will deliver case management services to the FSS participant.
- b. FSS case management includes, but is not limited to the following:
 - i. Evaluating the FSS participant's job marketability;
 - ii. Provide referrals to the local Michigan Works! Agency and other agencies in the community to obtain employment;
 - iii. If employed, encourage methods of improving or advancing within their current career;
 - iv. Providing supportive counseling;
 - v. Providing constructive feedback for goal completion;
 - vi. Client advocacy;
 - vii. Technical assistance;
 - viii. Exploring problem solving methods;
 - ix. Referrals to community resources; and
 - x. Addressing other barriers to self-sufficiency as identified by the FSS participant.
- c. At a minimum, the selected independent contractor must meet with the FSS participant four times per calendar year – once per quarter.

- i. Two of these meeting must be face-to-face with the other two having the option of phone contact.
 - d. All quarterly meetings must be documented on the FSS Participant Contact Form (FSS-326) and maintained in the FSS participant's file.
 - e. The selected independent contractor must assess the FSS participant's ITSP progress during the quarterly meetings.
 - i. If the Financial Capability requirement is not met within the initial 12 months of the FSS Program Contract, the FSS participant must be terminated. Exceptions to this requirement must be submitted to the Authority's FSS staff for review and approval/denial.
 - ii. If the FSS participant's household does not meet the TANF requirement within the final 12 months of the contract, the FSS participant must be terminated or a request for a FSS Program Contract extension submitted to the Authority's FSS staff.
 - iii. If the FSS participant does not meet the employment requirement within the final 12 months of the contract, the FSS participant must be terminated or a request for a FSS Program Contract extension submitted to the Authority's FSS staff.
 - iv. If the FSS participant fails to make progress on their personal goals outlined within the ITSP, the FSS participant must be terminated or a re-evaluation of their goals must be completed and documented.
 - f. If the FSS participant fails to meet the quarterly contact requirement or to meet the requirements outlined in the ITSP, the selected independent contractor will mail the FSS Participation Case Closure-10 Day Notice (FSS-96a).
 - g. If the FSS participant fails to respond within 10 calendar days, FSS Participation Case Closure (FSS-96b) will be completed and sent to the Authority's FSS staff to complete the termination process.
 - i. The entire FSS case file must be included with the termination form.

3. FSS Program Contract Graduations

- a. Graduations Based on the FSS Program Contract End Date.
 - i. The selected independent contractor must meet with the FSS participant 60 calendar days prior to their set graduation date to evaluate their final eligibility for graduation.
 - ii. FSS graduation is considered a positive exit to this voluntary program and may include the release of accrued FSS escrow funds.
 - iii. FSS participation can be concluded as a graduation when the FSS participant has fulfilled their obligation under the FSS Program Contract on or before the expiration of the FSS Program Contract end date. The following criteria must be met to consider graduation:
 - The FSS participant must be employed for the final 12 months of the FSS Program Contract. The 12-months of employment must be consecutive and consistent.

- Exceptions to the 12 month employment requirement must be submitted to the Authority's FSS staff for review and approval/denial.
 - iv. No family member residing with the FSS participant receiving the benefit of the HCV Program can receive TANF cash assistance in the final 12 months of the FSS Program Contract.
 - v. The FSS participant must have completed the required Financial Capability course in their initial 12 months of the FSS Program Contract.
 - vi. All FSS ITSP goals must be completed.
- b. Early Graduations**
- i. All of the above criteria is applied, but the graduation date is set based on the date the family goes over-income for the FSS and/or HCV Program, the agreed upon date for homeownership, porting the HCV out of state, or other eligible reason evaluated by the Authority's FSS staff on a case-by-case basis.
 - ii. As outlined by HUD, the FSS participant can go over-income for the FSS and/or HCV Program when:
 - 30 percent of the monthly-adjusted income equals or exceeds the published Fair Market Rent (FMR) for the family unit size for which the family qualifies.
 - The family has exceeded the HCV payment standards leading to over income and/or \$0 paid in Housing Assistance Payment (HAP).
 - iii. If it is determined that FSS participant can graduate early from the FSS program, the following documentation must be submitted to the Authority's FSS staff:
 - All case notes and correspondence;
 - Final ITSP signed and dated by the FSS participant; Proof that Financial Capability classes were completed (copy of the Financial Capability Counseling Referral (FSS-101) or Certificate of Completion);
 - FSS Participant Exit Interview (FSS-149); and
 - Welfare Status form (FSS-148).
 - iv. In addition to the documentation outlined above, early graduation requests must also include:
 - A completed and signed Early Graduation Request (FSS-35);
 - A written statement from the FSS participant on why early graduation from the FSS Program should be granted; and
 - A written statement from the selected independent contractor on why early graduation from the FSS Program is professionally supported and should be granted.

4. FSS Program Contract Extensions

- a. The initial FSS Program Contract is for a five-year period. FSS Program Contract extensions can be granted for up to 24 months beyond the initial five-year contract end date. All requests for FSS Program Contract extensions must be submitted within 60-calendar days of the initial FSS Program Contract end date to be considered. The selected independent contractor may submit an FSS Program Contract extension request for the following reason(s):
 - i. The FSS participant or immediate family member has a documented serious emotional, mental, or physical illness of long term duration during the FSS Program Contract.
 - ii. The FSS participant experiences an involuntary loss of employment within the required 12-month period for graduation eligibility. The involuntary loss of employment must be documented. Evidence of active job search for up to six months must be provided.
 - iii. The FSS participant's household has experienced an involuntary change of household composition due to death or desertion. If the FSS participant is no longer a part of the HCV household, the new HCV Head of Household may assume FSS Program Contract. The FSS participant must develop an ITSP and meet all the requirements previously outlined to successfully graduate the FSS Program.

- b. The selected independent contractor must submit the following documentation to the Authority's FSS staff within 60 calendar days of the initial FSS Program Contract end date to request a FSS Program Contract extension:
 - i. Complete and sign the Participation Extension Request form (FSS-34);
 - ii. A written statement from the FSS participant on why the FSS Program Contract extension should be granted; and
 - iii. A written statement from the selected independent contractor on why the FSS Program Contract extension is professionally supported and should be granted.

5. FSS Program Contract Terminations for Non-Compliance

- a. The selected independent contractor must assess the FSS participant's ITSP progress during the quarterly meetings.
 - i. If the Financial Capability requirement is not met within the initial 12 months of the FSS Program Contract, the FSS participant must be terminated. Exceptions to this 12 month requirement must be submitted to the Authority's FSS staff for review and approval/denial.
 - ii. If the FSS participant's household does not meet the TANF requirement within the final 12 months of the Program Contract, the FSS participant must be terminated or a request for a FSS Program Contract extension submitted to the Authority's FSS staff.
 - iii. If the FSS participant does not meet the employment requirement within the final 12 months of the Program Contract, the FSS participant must be terminated or a request for a FSS Program Contract extension submitted to the Authority's FSS staff.

- iv. If the FSS participant fails to make progress on their personal goals outlined within the ITSP, the FSS participant must be terminated or a re-evaluation of their goals must be completed and documented.
- b. If the FSS participant fails to meet the quarterly contact requirement or to meet the requirements outlined in the ITSP, the selected independent contractor will mail the FSS Participation Case Closure-10 Day Notice (FSS-96a).
- c. If the FSS participant fails to respond within 10 calendar days, FSS Participation Case Closure (FSS-96b) will be completed and sent to the Authority's FSS staff to complete the termination process. The entire FSS case file must be included with the termination form.

6. Termination by the Authority Due to HCV Program Violation(s)

- a. If, at any time, the FSS participant is terminated for violations of the HCV Program, he/she will automatically be terminated from the FSS Program and will forfeit any accumulated escrow.

7. Key to Own Homeownership Program

- a. The selected independent contractor will encourage homeownership as an ITSP goal and promote enrollment in the Authority's *Key To Own* homeownership program.
- b. At the initial FSS briefing, the FSS participant will complete the *Key to Own* Program Participation Confirmation (HO-204).
- c. If homeownership is an ITSP goal, the selected independent contractor will coordinate with Authority *Key to Own* staff to determine the appropriate sub-goals for the ITSP.
- d. If homeownership is not an initial ITSP goal, the selected independent contractor will initiate discussions on the Authority's *Key to Own* homeownership program at all quarterly face-to-face meetings with the FSS participant.

8. Required Attendance and Presentation at Continuum of Care Meetings

- a. The selected independent contractor will attend at least one Continuum of Care meeting per year. If the selected independent contractor covers more than one Continuum of Care area, they must meet this requirement for each area they represent.
- b. The Authority's FSS Program must be presented by the selected independent contractor at the attended Continuum of Care meeting.
- c. Proof of attendance and presentation must be provided to the Authority's FSS staff. Accepted proof includes the Continuum of Care meeting agenda and sign-in sheet showing the name of the selected independent contractor's representative.

**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. Bidders must be sure to indicate whether they wish to be considered for File Audit, Physical Inspection or both.

- A. Bidder's Experience.** The Authority has identified the qualifications outlined in the Scope of Work that it believes are necessary for the successful performance and completion of the services sought. Please refer to the service requirements provided above in the Scope of Work.
1. Have past experience in administering federal, state or local services that assist low income individuals and families to acquire skills and knowledge to gain access to new opportunities and to achieve economic self-sufficiency.
 2. Assign experienced personnel to perform the services or have personnel supervised by experienced staff.
- B. 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 any resolutions authorizing the approved signatory with the proposal. Include the name and telephone number of person(s) in your organization authorized to expedite any proposed contract with the Authority.
- C. 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.

- D. 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).
- E. 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.

F. 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.

G. 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 either email or fax.

- To ensure a fair and impartial process, the Authority's Procurement Office will only address those questions concerning the RFP submitted in writing via email or fax.
- 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 **FSS RFP** to the attention of:

**Michigan State Housing Development Authority
c/o Procurement Office
735 E. Michigan Avenue**

Lansing, Michigan 48912

E-mail: MSHDA-Procurement@michigan.gov
Fax: (517) 335-0125

- Address all questions regarding the RFP to the Authority's Procurement Office.
- Questions must be received in writing by **4:00 pm, Friday, September 23, 2016 Detroit, Michigan time.**
- Responses to properly submitted questions will be posted by **Monday, September 26, 2016.**
- The Authority will hold no other question sessions or bidder's conferences.
- All questions and answers related to this RFP will be supplied to Bidders 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
735 E. Michigan Avenue
Lansing, MI 48912**

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 an electronic 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.
- Submitted proposals must indicate the county or counties the Bidder wishes to serve.
- The due date for the Authority's receipt of the proposals responding to this RFP is **Thursday, October 13, 2016** at 4 p.m. Detroit, Michigan time.
- 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 awarded contract.

II. Proposal Delivery

A. Due Date. Proposals responding to this RFP are due **Thursday, October 13, 2016** at 4 p.m. Detroit, Michigan time

B. Originals and Copies. Submit one original proposal in electronic format (i.e., CD) outlining how the Bidder will provide the services described in the Scope of Work.

C. Delivery of Proposal. Direct all deliveries to:

MSHDA-Procurement
Michigan State Housing Development Authority
735 East Michigan Avenue
PO Box 30044
Lansing, MI 48909

D. Delivery Confirmation. Bidders considering delivery confirmation should select a delivery service who can provide the Bidder with notice of delivery.

E. 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.

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

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 submitted proposal based on Selection Criteria listed below. Bidders submitting for consideration individually as either File Audit or Physical Inspection will be evaluated in accordance with the respective criteria as provided below. Bidders submitting for consideration as both File Auditor and Physical Inspector will be evaluated according to both sets of criteria:

Selection Criteria	Maximum Points
Organization's Experience/Qualifications	40
Overall Quality of Program Services	30
Additional Services Provided	15
Capacity	15
Total	100

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 October 26, 2016 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, tabulations 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:

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. **Organization Chart.** The Bidder must show the names, functions, positions and titles of all professionals in the organization as well as any subcontractors, if applicable.
2. **Listing of Personnel.** The Bidder must include names, titles and a brief description of each individual's particular role or function within the organization. The listing should clearly designate the name and title of the individual who will function as the Authority's designated contact person for the contract. The listing must contain the designated contact person's address, telephone, fax and email address. The selected contractor's main office information should also be provided, if different than the contact person.

3. **Detailed Resumes.** The Bidder must include resumes for all personnel that will be directly involved in providing the services under an awarded contract, including any proposed subcontractors and their employees.
4. **Subcontractor Information (if applicable).** If a subcontractor will be used, detailed information regarding the entity must be provided as well as resumes and certifications for the individuals who will be performing services under the contract.

C. Qualifications & Experience.

1. **Prior Experience of Bidder.** Indicate prior experience of your organization that you consider relevant to the successful performance of the services and requirements 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.
 - a. Provide a detailed description of the individual's and/or firm's qualifications, experience and capacity that demonstrate its capability to perform the requested services.
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.
 - a. **Detailed Resumes.** The Bidder must include resumes for all personnel that will be directly involved in providing the services under an awarded contract, including any proposed subcontractors and their employees.
3. **Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan.** If any assigned personnel receive pensions from the State of Michigan, you must provide confirmation, signed by each assigned person with a State of Michigan pension, that he or she acknowledges and agrees that he or she must forfeit any pension payments made during the term of the contract. If a contract is awarded, each assigned person with a State of Michigan pension must submit a copy of the pensioned retiree's directions to the State of Michigan's Office of Retirement Services to withhold the retiree's pension payments during the contract term.
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. **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?)
4. **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. Capacity to Deliver Services.

1. List the Regions for which you wish to provide services using the attached map (**Exhibit F**). **If you wish to provide service to part of a region or provide**

service to specific counties in multiple regions, please indicate which counties you wish to cover in that region.

2. Describe your plan to deliver services to FSS participants in the regions identified including:
 - a. How you will monitor and follow-up with FSS participants;
 - b. How your agency will link FSS participants to services and resources in their community;
 - c. How staff will be effectively managed to assure delivery of quality services;
 - d. Office location(s), including hours of operation open to the public;
 - e. A list of additional staff to be hired (if any);
 - f. Caseload to staff ratios (**maximum is 150 participants per one full-time FSS Resource Coordinator**).
 - g. Procedures to address calls and emergencies.
3. Describe the competitive advantage that you believe makes your organization more efficient and successful in the delivery of case management services to FSS Participants.

F. Community Knowledge, Connection and Involvement.

1. Describe your existing relationships with:
 - a. Local Continuum of Care;
 - b. Homeless Assessment and Resource Agency (HARA), service organizations that provide resources to persons who are low-income, disabled and homeless;
 - c. Non-profit, Service and Civic Associations.
2. In the event that you do not have existing relationships with the organizations above for the counties in which you are applying, how do you plan to make those connections in order to serve FSS Participants?

G. 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 an awarded contract. No price changes will be permitted. **The rate of pay for an awarded contract is fixed at \$28.00 per month per active FSS participant assigned to selected contractors in Regions 1, 2 & 3. For Regions 4-10, the rate of pay for an awarded contract**

is fixed at \$27.00 per month per active FSS participant assigned to selected contractors.

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 (# of hours/per hour rate, etc.).
- b. Costs of supplies and materials.
- c. Other direct costs.
- d. Transportation costs.
- e. Total budget.

H. 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. All work must be completed within 24 months from contract signing.

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; and (4) quarterly reports (these will be due April 15, July 15, October 15, and January 15 each year during the project reporting period; See Exhibit E).

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

I. 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.

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.
- J. 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 entitled FSS RFP.

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

By: _____

Its: _____

Date: _____

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

EXHIBIT D

KEY PERSONS/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/Subgrantee _____

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/Contractor _____

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 _____

Print or Type Contractor/Subcontractor Name Above Line

By: _____ Date _____
Signature

Name of Signatory for Contractor/Subgrantee: _____
Print/Type Name of Signatory Above Line

Its: _____

Federal Identification Number: _____

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

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

EXHIBIT E

PERFORMANCE MEASURES

I. Overview

A. The Authority shall measure the Selected Independent Contractor's performance of the activities described in the Scope of Work (Exhibit A) based on the following performance measures:

1. Quality On-Site Review(s);
2. Data entry and Quarterly Reports; and
3. Responsiveness to the Authority's staff.

II. Quality On-Site Reviews

A. Quality On-Site Reviews will be completed at a minimum once per calendar year. The Authority FSS staff reserves the right to conduct On-Site Reviews more frequently as needed. During the Quality On-Site Review, Authority FSS staff will come to the physical location of the Selected Independent Contractor and will pull at a minimum 10 randomly selected FSS participant files in the counties to which the selected bidder is assigned. Files will be rated either pass, pass with comment or incomplete. Files are rated based on the following criteria:

1. Presence of Required forms in files.
2. Evidence of required quarterly contact with participants.

B. The Selected Independent Contractor's ratings will be determined by the following criteria:

1. **Meets Expectations.** To achieve an overall Meets Expectations Rating, the Selected Independent Contractor must have achieved 80 percent pass or pass with comment ratio on the ten files reviewed.
2. **Low Performing.** An overall Low Performing Rating will be assigned to any Selected Contractor who has less than 80 percent of files receiving a pass or pass with comment rating.

III. Data Entry and Reports Criteria

A. The review of Data Entry and required Quarterly Reports will be completed in accordance with the Monitoring Guidelines set forth in the FSS Program Guidelines. Review of Data Entry and Reports will be completed at a minimum once per Quarter. The Authority reserves the right to review more frequently as deemed necessary. The Authority FSS staff will measure the following standards when conducting Data Entry and Reports ratings:

1. FSS Participant Graduation, Extension or Termination paperwork processed and forwarded to MSHDA within 60 days of the last day of the participant's contract.

2. Individual Training and Service Plan's (ITSP) entered into Elite within 14 days' of briefing the FSS participant.
 3. Submission of the required quarterly data reports by April 15 (1st Quarter), July 15 (2nd Quarter), October 15 (3rd Quarter), and January 15 (4th Quarter).
- B.** The Selected Independent Contractor's ratings will be determined by the following criteria:
1. **Meets Expectations.** To achieve an overall Meets Expectations Rating, the Selected Independent Contractor must have achieved 80 percent consistency with data entry, data reports and submission of documents.
 2. **Low Performing.** An overall Low Performing Rating will be assigned to any Selected Independent Contractor who has less than 80 percent consistency with data entry, data reports and submission of documents.

IV. Responsiveness to Authority Staff.

- A.** Review of Responsiveness to Authority FSS Staff will be completed at a minimum once per Quarter. The Authority FSS staff reserves the right to review more frequently as deemed necessary. The Authority FSS staff will measure the following standards when conducting Responsiveness to Staff Standard:
1. Responds to all calls, emails and correspondence from the Authority staff within two business days.
- B.** The Selected Independent Contractor's ratings will be determined by the following criteria:
1. **Meets Expectations.** To achieve an overall Meets Expectations Rating, the Selected Contractor must have achieved 80 percent consistency in regard to responding to Authority staff.
 2. **Low Performing.** An overall Low Performing Rating will be assigned to any Selected Contractor who has less than 80 percent consistency in regard to responding to Authority staff.

V. Uncorrected Deficiencies

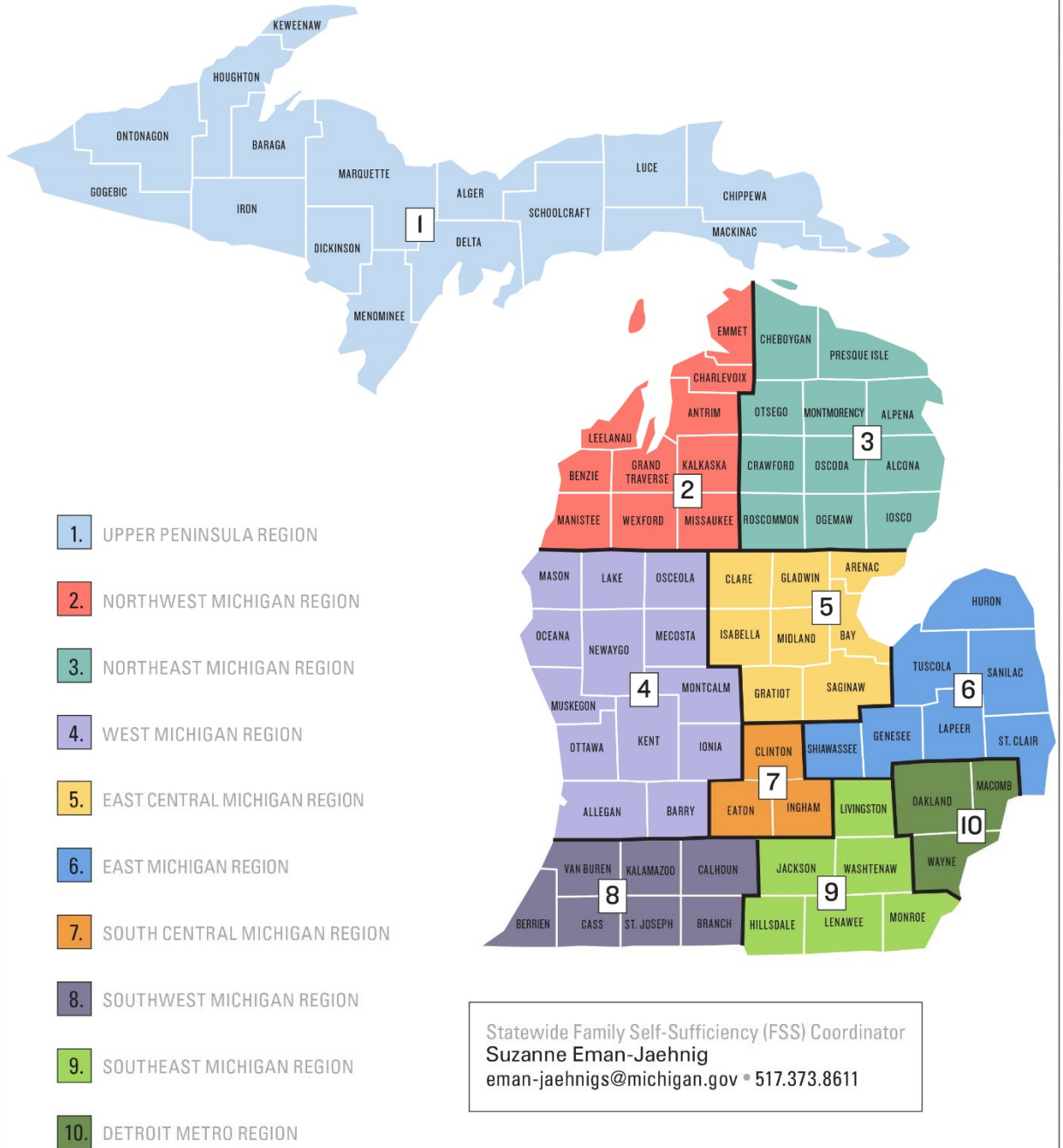
- A.** If the standards set forth for performance in this Exhibit are not met, a Corrective Action Plan will be required and must be submitted no later than five (5) business days to the Homeless Programs Manager of the Rental Assistance and Homeless Solutions Division for review and approval. The Contractor will be given the specific standard that the selected contractor is deficient in and what expectations the Authority has for meeting expectations for that standard. The selected contractor must provide the following to the Authority:
1. Specific steps that will be taken to correct the deficiencies.
 2. The time frame adhered to and when the selected contractor expects the deficiencies to be rectified.
 3. Identify specific staff that will be responsible for rectifying the deficiencies.

- B.** No more than one Corrective Action Plan will be executed during a twelve (12) month period during the term of an awarded agreement. Failure to meet the terms outlined in the Corrective Action Plan may result in a material breach of an awarded agreement.

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

**EXHIBIT F
REGIONS MAP**

Family Self-Sufficiency Map



Statewide Family Self-Sufficiency (FSS) Coordinator
Suzanne Eman-Jaehnig
 eman-jaehnigs@michigan.gov • 517.373.8611