



REQUEST FOR PROPOSALS

DATE OF ISSUE: April 25, 2019

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) from Contractors to complete a National Register of Historic Places nomination for the George Washington Carver Elementary School located at 21272 Mendota in Royal Oak Township, Oakland County, Michigan.**

Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	May 13, 2019	4 PM Eastern (Detroit, MI) *
Anticipated date Authority will post answers to questions:	May 17, 2019	4 PM Eastern (Detroit, MI) *
Proposal deadline:	May 30, 2019	4 PM Eastern (Detroit, MI) *
Anticipated contract begin date:	July 1, 2019	

* Submissions received at 4:01 p.m. are considered late and will not be considered further.

I. Services Sought by Authority

The Michigan State Housing Development Authority (“Authority”) State Historic Preservation Office (“SHPO”) is seeking a Contractor to undertake the development of a National Register of Historic Places nomination for the George Washington Carver Elementary School located at 21272 Mendota in Royal Oak Township, Oakland County, Michigan. Bidder must be authorized to do business in the State of Michigan.

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.

II. Contents of this RFP

- Overview of services sought, tasks and activities (“Scope of Work”)

- Exhibit A – Notices to Bidders
- Exhibit B – Submission & Selection
- Exhibit C – Proposal Format
- Exhibit D – Project Personnel Form

III. Overview

The State Historic Preservation Office (SHPO) of the Michigan State Housing Development Authority is contracting with a historian or architectural historian that meets National Park Service 36 CFR 61 professional qualifications. Contractor to undertake the development of a National Register of Historic Places nomination for the George Washington Carver Elementary School located at 21272 Mendota in Royal Oak Township, Oakland County, Michigan. During the second wave of the Great Migration, as African Americans from the South flocked to Detroit to work in defense factories, racial restrictions on housing caused a serious housing shortage for the city's growing black population. African Americans were able to find an unincorporated section of land in Oakland County just north of Detroit's historically black 8 Mile-Wyoming neighborhood where they were able to build homes. Constructed in 1945, the township's school district was split in two and George Washington Carver Elementary School served an all-black student population. The school closed in 1982 and was later converted to a community center. There is a Michigan State Historical Marker at the site.

The SHPO is currently in the process of documenting Detroit's 20th Century African American Civil Rights sites through a National Park Service grant. This project is expected to be completed in December 2019. A historic context for 20th Century African American Civil Rights sites in Detroit will be available to the chosen Contractor. In addition, the National Park Service has developed a historic context entitled Civil Rights in America: A Framework for Identifying Significant Sites available at

https://www.nps.gov/subjects/tellingallamericansstories/upload/CivilRights_Framework.pdf

The contractor will also advise and educate Authority representatives related to contractor services sought as outlined below.

IV. Objectives, Tasks, Activities and Deadlines

A. General Objectives

To successfully perform the services described in Section I above, the Contractor must satisfy the following objectives:

1. Complete a National Register of Historic Places (NRHP) Nomination for the George Washington Carver Elementary School located at 21272 Mendota in Royal Oak Township, Oakland County, Michigan.
2. Participate in specified meetings with the State Historic Preservation Office (SHPO), the local community, and other interested parties;
3. Present the NRHP nomination to the State Historic Preservation Review Board (SHPRB) at its first regularly scheduled meeting held after the nomination(s) have been completed and accepted by SHPO.

B. Standards of Performance

The Contractor shall perform the tasks/activities and complete Section II in accordance with the following standards:

1. The lead staff person must meet the professional qualification requirements for “historian” and “architectural historian,” as set forth in 36 CFR Part 61 – Appendix A;
2. Demonstrated proficiency in Microsoft Office suite, including Word; PowerPoint; and Excel;
3. The successful response will provide a summary of the proposed research methodology that addresses the applicable National Register of Historic Places criteria and areas of significance, and includes potential sources and repositories of information related to this resource.
4. The applicable National Register of Historic Places bulletins and guidelines as well as guidelines developed by the Michigan SHPO, including but not limited to:
 - a. National Register Bulletin 16A: *How to Complete the National Register Registration Form*
 - b. National Register Bulletin 15: *How to Apply the National Register Criteria for Evaluation*
 - c. *National Register Draft Electronic Map Policy Factsheet* (June 2012)
 - d. *National Register Photo Policy Factsheet* (May 15, 2013)
 - e. SHPO’s *Manual for Historic and Architectural Surveys in Michigan* (2018)
 - f. *Michigan State Historic Preservation Office Style Guide*

C. Tasks & Activities

To achieve Sections II and III, the Contractor shall perform the following activities/tasks:

1. Meetings.

i. Project Initiation Meeting. Meet with SHPO’s National Register Coordinator, Survey Coordinator, Preservation Planner, Grants Manager/Budget Analyst, and local representatives (if applicable) to discuss research methodology and project framework. This meeting shall be held in Lansing, Michigan, at the SHPO office.

ii. Community Engagement Meeting(s). Hold a meeting in the community at the beginning of the project to acquaint public officials and the general public with the project goals. The purpose will be to answer questions about the NRHP process, provide an explanation of the benefits of being listed in the NRHP, and to solicit information. The format of this meeting shall be discussed with and approved by SHPO staff prior to meeting coordination and scheduling.

Hold a meeting in the community at the end of the project to present the NRHP nomination and research findings and answer questions on NRHP listing.

Coordinate and consult with the local representatives, primary contacts, and local historians as necessary to complete the activities described in the general objectives. Note, however, that the Contractor alone shall be responsible for the successful completion of all products.

iii. Review Meeting(s). As needed after submission of Deliverable #1, meet with SHPO staff to discuss comments and make needed adjustments such as writing style, additional research needed, and development of historic context(s).

- iv. **Presentation to the State Historic Preservation Review Board (SHPRB).** Present the NRHP nomination(s) to the SHPRB at its first regularly scheduled meeting held after the nomination(s) have been completed and accepted by SHPO. SHPRB meetings are typically held in January, May, and September.
- v. **Contract Closeout Meeting.** Meet with SHPO's National Register Coordinator, Survey Coordinator, Preservation Planner, Grants Manager/Budget Analyst and Buyer to review Project Completion Report and discuss lessons learned during project.

D. Deliverables.

Deliverable Format. All nomination materials must be submitted in Microsoft Word .doc or .docx, Microsoft Excel .xls or .xlsx, Microsoft PowerPoint file in .ppt or .pptx format, as applicable. Final nomination documents must be submitted on a labeled USB ("thumb" or "flash") drive to SHPO. The bibliography shall be formatted using an accepted standard, the *Chicago Manual of Style* is preferred, and be submitted with the nomination(s) at each review stage. The NRHP nomination forms shall be submitted to the Authority for review at three intervals: first draft of all sections (75% completion), second draft of all sections (95% completion), and the final NRHP nomination (100% completion). All comments provided by the reviewers of the nomination must be addressed in the final product.

Include in the "Introduction" of any written, audio, visual, or other material, as well as in public announcements and news releases produced through this nomination, a credit that reads verbatim as follows:

The activity that is the subject of this project has been financed in part with Federal funds from the National Park Service, U.S. Department of the Interior, through the Michigan State Housing Development Authority. However, the contents and opinions herein do not necessarily reflect the views or policies of the Department of the Interior or the Michigan State Housing Development Authority, nor does the mention of trade names or commercial product herein constitute endorsement or recommendation by the Department of the Interior or the Michigan State Housing Development Authority.

This program receives Federal financial assistance for identification and protection of historic properties. Under Title VI of the Civil Rights Acts of 1964, Section 504 of the Rehabilitation Act of 1973, and the Age Discrimination Act of 1975, as amended, the U.S. Department of the Interior prohibits discrimination on the basis of race, color, national origin, disability, or age in its federally assisted programs. Michigan law prohibits discrimination on the basis of religion, race, color, national origin, age, sex, marital status, or disability. If you believe you have been discriminated against in any program, activity, or facility as described above, or if you desire further information, please write to:

*Chief, Office of Equal Opportunity Programs
United States Department of the Interior
National Park Service
1849 C Street, NW, MS-2740
Washington, DC 20240*

Research Methods. Undertake primary and secondary research and write historic contexts and identify areas and periods of significance in compliance with National

Register Bulletin 16A, *How to Complete the National Register Registration Form*. Research must include a variety of source materials as listed in the Historical Research section of the SHPO's *Manual for Historic and Architectural Surveys in Michigan* (2018). Research will include, at a minimum, use of early maps, directories, tax assessor records, and collections available at local repositories.

National Register of Historic Places Registration Form – Narrative Description (Section 7). The Narrative Description must conform to the guidelines established in **National Register Bulletin 16A, pages 24-34**. The narrative text should also conform to the *Michigan State Historic Preservation Office Style Guide* found on the SHPO website at https://www.michigan.gov/documents/mshda/mshda_shpo_20190104_mishpo_style_guide_642689_7.pdf

National Register of Historic Places Registration Form – Statement of Significance (Section 8). The Statement of Significance must conform to guidelines established in **National Register Bulletin 16A, pages 25-51. Special attention should be given to the development of applicable historic contexts (See National Register Bulletins 15, 16A, pages 47-51, and 16B, pages 11-13, in particular)**. The narrative text should conform to the *Michigan State Historic Preservation Office Style Guide* found on the SHPO website at https://www.michigan.gov/documents/mshda/mshda_shpo_20190104_mishpo_style_guide_642689_7.pdf.

1. **Deliverable #1 – Prepare and submit to the SHPO an outline of the information the preparer intends to include in the Narrative Description (Section 7) and the Statement of Significance (Section 8) of the *National Register of Historic Places Registration Form*.** The outline should be a detailed sentence outline, though it does not need to be written in narrative form.
 - i. The sentence outline for the Narrative Description should include, at a minimum, sections that discuss the setting, the exterior, the interior, and the integrity of the property.
 - ii. The sentence outline for the Statement of Significance should, at a minimum, provide justification for each of the National Register Criteria selected, the justification for the selection of all appropriate Areas of Significance, and the reasons for their inclusion.

2. **Deliverable #2 – NRHP First Nomination(s) Draft (75%).** Prepare and submit to the SHPO a first draft of the NRHP nomination (75% completion). **All sections** of the *National Register of Historic Places Registration Form* (form 10-900) must be included with this submission. Deliverable #1 must also include:
 - i. **Historical Photographs.** Include with Deliverable #1 any historical photographs that depict the resource throughout its history. These may be exterior or interior views, or streetscape images.

 - ii. **Archaeological Assessment.** Consideration of archaeological resources provides a holistic depiction of the state's historic properties. As such, it is important to consider the prospect that archaeological deposits may be present on the property.

The presence of a recorded archaeological site can be determined by consulting the state archaeological site file held in the State Historic Preservation Office. The potential presence of historical period

archaeological resources such as privies, cisterns, and former outbuildings can be evaluated by examining historical plat maps, atlases, aerial photos, Sanborn maps, and other similar sources. Evaluating the potential presence of Native American archaeological sites may be more challenging. Soliciting information from the property owner about the discovery of artifacts is an important first step. Proximity to a source of surface water can also be a clue to the likelihood that an archaeological site may be present. Utilizing the services of a qualified archaeologist in performing this assessment is an option.

As part of the Section 7 Narrative Description, include a contextual description of known archaeological sites and the potential of the site to yield archaeological information. **NOTE: this is not intended to establish significance under Criterion D.** The description should account for Native American sites, land use changes, removed buildings, and other occupational-related features. See SHPO staff for examples of an archaeological description.

- iii. **Draft Locational Maps.** Provide two (2) locational maps that conform to the requirements stated in **National Register Bulletin 16A, pages 61-62**, and in accordance with the updated guidance found in the *National Register Draft Electronic Map Policy Factsheet* (June 2012). **NOTE:** SHPO does not accept paper USGS maps; Both SHPO and NPS prefer geographical coordinates in Latitude and Longitude, not UTM; All maps must be submitted in digital form, PDF is preferable.
 - iv. **Draft Nomination(s) Photographs.** Provide a selection of photographs that fully illustrate the property. These are not historical photographs, but current views that depict the resource as it is today. Images submitted should be high-resolution digital images in JPEG format named according to and meeting or exceeding the “best” requirements set forth in, the *National Register Photo Policy Factsheet* (May 15, 2013) and the SHPO’s *Manual for Historic and Architectural Surveys in Michigan* (2018), pages 9-11 found at https://www.michigan.gov/documents/mshda/mshda_shpo_20180621_above_ground_survey_manual_625967_7.pdf
 - v. **Sanborn Maps.** As part of Deliverable #1, provide all Sanborn maps available for the resource in color printed (minimum of 11x17-inch paper) or high-resolution digital format. Illegible maps or low-resolution files will not be accepted.
3. **Deliverable #3 – Survey Inventory Form.** Complete one (1) survey inventory form for each resource(s). The Survey form template will be provided by SHPO at the Project Initiation Meeting (see IV.1.i above).
 4. **Deliverable #4 – NRHP Second Nomination(s) Draft (95%).** Prepare and submit a revised draft of the NRHP nomination (95% completion) based on additional research and comments received from SHPO staff.
 5. **Deliverable #5 – NRHP Final Nomination Packet (100%).** This is the final submission package for the NRHP nomination. Acceptance of the final nomination form is contingent on SHPO staff approval. All parts of the National Register of Historic Places Registration Form (form 10-900) must be submitted, along with all

additional products, including final locational maps, photographs, PowerPoint presentation, etc. Deliverable must also include:

- i. **Interested Persons List.** Provide to the SHPO one (1) list that includes, at a minimum, each property owner or owners, the chief elected official of the community in which the property is located, and the appropriate state representative and state senator. This list may also include any other interested persons or agencies which should be notified, such as local planning or historical commissions, historical societies, museums, tourism organizations, chambers of commerce, etc.
 1. Include for each person listed their name, title, and mailing address.
 2. For properties with ten (10) or less persons, the list may be submitted in Microsoft Word. For properties with eleven (11) or more persons, the list must be submitted in Microsoft Excel.
 - ii. **Research Notes.** Provide to the SHPO copies of all source materials used in preparation of the nominations, including, but not limited to, books, newspapers, historical maps, historical photographs, journals, letters, interviews, etc. It is preferred that research notes are submitted as digital files, but paper copies will be accepted. Research notes must be grouped by source type (photographs, newspapers, maps, photographs, etc.). For each source type, a naming convention should be developed in consultation with SHPO at the Project Initiation Meeting (see IV.1.i above).
6. **Deliverable #6 – Prepare a NRHP Presentation for Presentation to the State Historic Preservation Review Board (SHPRB).** Create and submit to the SHPO one (1) Microsoft PowerPoint file in .ppt or .pptx format that:
- i. Includes one (1) title slide that states the name of the historic resource, the city, and the county in which the property is located, and the presenter's name;
 - ii. Includes enough photographs to adequately portray the significance of the property. This may include all final nomination photographs, or a selection of the same, respective of the limits noted below
NOTE: Presentations to the SHPRB are limited to five (5) minutes, as such it is preferable to limit the number of slides in each presentation to no more than ten (10);
 - iii. Is free of any formatting such as photograph text labels, background designs, etc.; and
 - iv. Includes images that, to the extent possible, fill the entirety of the slide.

Present the NRHP nomination(s) to the SHPRB at its first regularly scheduled meeting held after the nomination(s) has been completed and accepted by SHPO. SHPRB meetings are typically held in January, May, and September.

7. **Deliverable #7 – Quarterly Progress Reports.** Provide to the SHPO quarterly progress reports using the form provided by the SHPO. Quarterly progress reports shall be due by January 15, April 15, July 15 and September 15 during of each year during the project reporting period and will include:
- i. Title sheet identifying the project, contract number, and name and address of the Contractor.
 - ii. Names and titles/responsibilities of the project manager and persons

- working on the project, including any subcontractors.
- iii. A financial report of expenditures to date including any changes to approved budget or approved work schedule.
- iv. A written summary 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.

8. Deliverable #8 – Project Completion Report. Provide a brief, professional quality report that includes the following:

- i. A title sheet identifying the project, the contract number, and the name and address of the Contractor;
- ii. The names and titles/responsibilities of the project manager and persons working on the project, including any subcontractors;
- iii. The budget for the project; and
- iv. A written narrative summary of the project and its outcomes including an outline of the methodology used (as compared with that initially proposed), evaluation of the project results, and a summary of what worked and what the Contractor would do differently the next time the Contractor undertakes a project of this nature. Submitted one printed copy to the SHPO.

E. Timeline for Completing General Objectives. This contract must be completed no later than September 30, 2020. The following is a suggested template for the project timeline and provides the preferred format. It is the responsibility of the applicant to provide a detailed timeline that will enable SHPO's assessment of the applicant's proposed methodology. A detailed timeline would include all significant dates, their associated tasks or activities, and the party responsible for carrying them out. Examples of tasks to include are: meetings, research periods, review periods for drafts, quarterly and final report dates, deliverable dates, and the completion date.

For planning purposes, SHPO review time is 30 days. The State Historic Preservation Review Board (SHPRB) meets three times a year in January, May and September. Completed nominations must be submitted no later than one month in advance of the scheduled date of the SHPRB where the nomination will be presented.

SAMPLE – Project Timeline Template

<i>Estimated Completion Dates</i>	<i>Task/Project Components & Responsible Party</i>

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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.

- 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

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 **May 13, 2019** 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 **May 17, 2019**. The Authority will hold no other question sessions or bidder's conferences.

B. Delivery of Proposal. Address questions using the subject line ***NRHP George Washington Carver Elementary School*** 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.

1. **Due Date.** Proposals responding to this RFP are due **May 30, 2019** at **4 p.m.** Eastern Time (Detroit). Submissions received at 4:01 p.m. are considered late and will not be considered further.
2. **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.
3. **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.

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:

Research framework and proposed methodology	(30 Points)
Quality and relevant experience of staff person(s) assigned to carry out the work	(30 Points)
Knowledge of and past experience with the National Register of Historic Places and its criteria and requirements	(20 Points)
Knowledge of and familiarity with 20 th century African American civil rights history	(10 Points)
Knowledge of 20 th century educational building architecture	(5 Points)
<u>Education and certification</u>	<u>(5 Points)</u>

Total Possible Points: 100 Points

Only proposals receiving a score of **80** or more, based on the technical evaluation points above, will have pricing evaluated and be considered for award.

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 **July 1, 2019** 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.

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**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. 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.
10. 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.
11. 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.
12. 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.
13. 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.
14. 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 10 years.

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.
 - a. Provide their resumes or CVs.
 - b. List their responsibilities and the specific task(s) that will be carried out and the anticipated time frame(s) for each task.
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 only of the individuals in your organization that will be performing the actual work that will lead to the successful completion this project as described in this RFP.
 - a. Include sufficient detail to demonstrate the relevance of the individual's experience and education to the project goals. Submit no more than three (3) relevant samples per individual.
 - b. Emphasis should be placed on the experience of the individual over the firm. For example, if the RFP is for a National Register of Historic Places nomination, do not submit examples of rehabilitation projects the firm has undertaken. Submit examples of National Register nominations, survey work, etc. the staff person assigned to this project has completed.
 - c. Demonstrate knowledge of historic preservation, the National Register of Historic Places, African American Civil Rights history, and the architecture of 20th Century educational buildings.
2. **Experience of Proposed Personnel Assigned to Provide Services.** The proposal should describe the education and demonstrate the quality of experience of the person(s) directly assigned to provide the proposed services. Experience should be demonstrated by the submittal of no more than three (3) work samples relevant to this project. The proposals should show that the manager with direct oversight of project personnel meets NPS 36 CFR 61 professional qualifications for historian or architectural historian.
3. **Professional References.** Include two professional references who can provide information regarding the Bidder's prior past performance.
4. **Additional Information and Comments.** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

5. **Proposed Services.** Address and describe the process used to render the services and how the services will be rendered. Include the research framework and methodology and timeframe for project completion.
6. **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.
7. **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.)
 - 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.)
8. **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.
9. **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.

10. 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.

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 (must be based on State of Michigan per diem rates). Description should include when and why lodging is needed.
- c. Meal costs (must be based on State of Michigan per diem rates). Description should include when and why meals are needed.
- d. Transportation costs (must be 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.

Budget Items	Pricing

Proposals should reflect 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 contract. Rates for 2018 can be found here:
http://www.michigan.gov/documents/dtmb/Travel_Rates_FY18_Jan2018_609896_7.pdf

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. It is the responsibility of the applicant to provide a detailed timeline that will enable SHPO’s assessment of the applicants proposed methodology. A detailed timeline would include all significant dates, their associated tasks or activities, and the responsible authority. Some examples of tasks to include are: meetings, research periods, review periods for drafts, quarterly and final report dates, deliverable dates, and the completion date.

For planning purposes, SHPO review time is 30 days. The State Historic Preservation Review Board (SHPRB) meets three times a year in January, May and September. Completed nominations must be submitted no later than one month in advance of the scheduled date of the SHPRB where the NRN will be presented.

Include a timetable indicating how the project will be scheduled. The timetable should include at a minimum: all meetings, submittal of drafts, review times, submittal of quarterly reports, the SHPRB meeting presentation, and submittal of the final report.

<i>Estimated Completion Dates</i>	<i>Task Project Components & Responsible Party</i>
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12. Disclosures.

A. 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.

- i. 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.

- ii. 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.

B. Potential Conflicts of Interests. Potential conflicts of interest may arise from the Bidder’s officers, employees, members, SHPO Review Board members, board members, independent contractors or subcontractors the Bidder will use to render services, if the organization enters into a contract with the Authority.

- i. 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.

- ii. 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.

C. Family Members Who Work for Authority.

- i. 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.

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13. **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 National Register of Historic Places Nomination for the George
Washington Carver Elementary School 21272 Mendota, Royal Oak
Township, Oakland County, Michigan**

**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: _____