



REQUEST FOR PROPOSALS

DATE OF ISSUE: September 19, 2018

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for an individual/firm to facilitate five regional planning workshops and one stakeholders’ workshop on the future of historic preservation in the state of Michigan.**

Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	October 2, 2018	4 PM Eastern (Detroit, MI) *
Anticipated date Authority will post answers to questions:	October 8, 2018	4 PM Eastern (Detroit, MI) *
Proposal deadline:	October 24, 2018	4 PM Eastern (Detroit, MI) *
Anticipated contract begin date:	December 1, 2018	

* 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 an individual/firm to facilitate five regional planning workshops and one stakeholders workshop on the future of historic preservation in the state of 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. Background

The State Historic Preservation Office (SHPO) receives federal monies through the Historic Preservation Fund (“HPF”) to operate its programs. One of the requirements of HPF funding is that the SHPO must develop a statewide five-year historic preservation plan that establishes historic preservation goals and objectives; identifies critical issues, threats, and opportunities facing the state’s historic resources; and identifies priorities for the evaluation, treatment and registration of historic resources. The statewide plan is typically broad statements of policy (rather than specific details or actions) that can apply to all preservation organizations around the state. According to the HPF Grants Manual:

The State Plan is used by the State Historic Preservation Office and others throughout the State for guiding effective decision-making on a general level, for coordinating Statewide preservation activities, and for communicating Statewide preservation policy, goals, and values to the preservation constituency, decision-makers, and interested and affected parties across the State. As such, the State Plan is not an office management plan for the SHPO office. The State Plan provides direction and guidance for general-level decision-making, rather than serving as a detailed blueprint for making place-specific or resource-specific decisions.

Public participation is a key component of the preservation planning process. State historic preservation plans must meet the criteria set forth in the National Park Service’s HPF Grants Manual under Section 6.G Historic Preservation Planning Program Area. The HPF Grants Manual is available on-line at https://www.nps.gov/preservation-grants/manual/HPF_Manual.pdf

Michigan’s current state historic preservation plan, *Michigan’s Statewide Historic Preservation Plan 2014-2019*, is available on-line at https://www.michigan.gov/documents/mshda/mshda_shpo_20150922_michigan_preservation_plan_500540_7.pdf

IV. Overview

The SHPO of the Authority is seeking an individual/firm to facilitate a total of six public meetings, five regional planning workshops and one stakeholders workshop, on the future of historic preservation in the state of Michigan. The workshops are being conducted to fulfill the public participation requirement for the state’s five-year historic preservation plan. The Authority seeks these services to assist in determining the critical issues both positively and negatively affecting historic preservation in Michigan, determine the threatened historic resources in the state, and develop historic preservation goals and objectives that will guide Michigan’s historic preservation community for the next five years. This service will assist the state’s historic preservation planner by providing information that will serve as the foundation for Michigan’s five-year historic preservation plan to be completed by November 2019.

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

V. Objectives, Tasks, Activities and Deadlines

A. Objectives. To successfully perform the services described in Section IV above, the contractor (“Contractor”) must satisfy the following objectives:

1. Participate in a pre-planning meeting with SHPO in Lansing;
2. Facilitate a total of six planning workshops. Five regional planning workshops for the general public to be held in the communities of Bay City, Escanaba, Detroit, Grand Rapids, and Traverse City and one stakeholders workshop to be held in Lansing;
3. After each workshop, provide a summary of the findings of that workshop;
4. Provide a comprehensive final report that includes:
 - a. a summary of the findings of each public participation workshop and the stakeholders workshop;
 - b. a proposed vision statement;
 - c. recommendations for statewide five-year historic preservation goals and objectives;
 - d. a list of the state’s most threatened categories of resources; and
 - e. a list of significant issues that will positively or negatively affect historic preservation efforts in Michigan over the next five years.

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

To achieve the objectives, the Contractor shall perform the following activities/tasks:

1. Pre-Planning Meeting

The Contractor will attend one preliminary meeting in Lansing, organized by the SHPO, with representatives of the SHPO to discuss a strategy for the workshops.

3. Facilitate Five Regional Historic Preservation Public Participation Workshops

- a. The regional workshops will be held in Bay City, Detroit, Escanaba, Grand Rapids, and Traverse City. SHPO will be responsible for logistics and any publicity related to the workshops. The workshops will be open to the public and attendance for a workshop can range from less than ten to more than fifty participants.
- b. The Contractor, in discussion with the SHPO, will develop a common agenda for the regional workshops, proposed topics for discussion, and potential questions to encourage and direct discussion during the workshops.
- c. The Contractor will be responsible for facilitating the workshops and documenting the responses during each session to analyze the findings for preparation of a final report. Any supplies needed for the meeting facilitation (stickers, easel paper, index cards, markers) will be provided by the Contractor.

4. Facilitate One Stakeholders Workshop

The Contractor will facilitate a workshop of historic preservation professionals, planners, developers, Tribal representatives, other state agencies, historic district commissioners, etc. in Lansing, Michigan. The SHPO will be responsible for workshop logistics including, identifying and contacting participants, and providing a list of attendees. The workshop will utilize the information gathered during the regional workshops to draft a vision statement, preservation goals, and historic resource assessment for review by the stakeholders.

5. Final Report

The Contractor will prepare a comprehensive final report. The report will include:

- a. Summaries of the findings for each regional workshop and the stakeholders workshop;
- b. A draft vision statement;
- c. Proposed five-year historic preservation goals;
- d. The objectives, strategies and actions that will help to accomplish the goals;
- e. A list of the critical issues, threats, and opportunities that affect cultural heritage resources in Michigan (including architectural, historical, archaeological, and landscape resources);
- f. A prioritized list of most threatened resources and those that are most significant to Michigan history and that should be protected.

C. Deliverables.

The Contractor will furnish the SHPO with one paper printout of the report. The report will be furnished to the SHPO electronically in Microsoft Word or in a manner approved by the SHPO. (Background data and/or lists may be provided in Microsoft Excel.)

III. Timeline for Completing Objectives

This contract must be completed by July 31, 2019. The following is a suggested timeline.

Proposed Project Timeline

<i>Completed Service/Project Components</i>	<i>Estimated Completion Dates</i>
December 1, 2018	Execute Contract
January 15, 2019	Contractor Meets with SHPO
February 1–April 30, 2019	6 Planning Workshops Held
April 15, 2019	Quarterly Progress Report
May 30, 2019	Contractor Submits Draft Report
June 30, 2019	SHPO provides comments on draft report to Contractor
July 31, 2019	All Final Deliverables Must Be Submitted; Contract ends; Contractor Submits Final Invoice to SHPO

IV. Standards for Performance

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

- A. Requirements found in the National Park Service HPF Grant Manual, Section 6.G. Historic Preservation Planning Program Area. Available on line at: https://www.nps.gov/preservation-grants/manual/HPF_Manual.pdf
- B. The lead staff person/facilitator must have a bachelor’s degree in public policy, public administration, or a related field, with at least three years of demonstrated experience as a professional facilitator;
- C. Ability to travel to five regional workshops held in the communities of Bay City, Escanaba, Detroit, Grand Rapids, and Traverse City and one stakeholders workshop to be held in Lansing;
- D. Proficient in Microsoft Suite.

This project is funded in part by the U.S. Department of Interior, National Park Service. A sample list of the statutes, rules and laws applicable to the performance of this contract are 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

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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 **October 2, 2018** at **4 p.m.** Eastern Time (Detroit). Submissions received at 4:01 p.m. are considered late and will not be considered further.

Responses to properly submitted questions will be posted on or around **October 8, 2018**. The Authority will hold no other question sessions or bidder's conferences.

B. Delivery of Proposal. Address questions using the subject line ***SHPO Five Year Plan*** 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 **October 24, 2018** 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:

- | | |
|--|--------------------|
| 1. Proposed approach to conducting the facilitation, staffing, and timeframes for performing services | (40 Points) |
| 2. The quality of experience, including the examples of prior Facilitations, and experience working with government agencies | (20 Points) |
| 3. Education and/or certification | (20 Points) |
| 4. Experience and knowledge with historic preservation | (10 Points) |
| 5. <u>Reasonableness and feasibility of fee</u> | <u>(10 Points)</u> |

Total Possible Points:

100 Points

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

B. Proposal Selection. The Authority’s review may take up to four weeks after the closing date for submitting proposals. The Authority anticipates notifying the selected contractor on or about **December 1, 2018** via e-mail and posting on the Authority’s website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and the Authority’s Board.

C. Cancellation of Selected Proposal. The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals. Reasons for canceling the selected proposal may include, but are not limited to, the following:

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

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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 of your organization that you consider relevant to the successful accomplishment of the project described in this RFP.
 - a. Include sufficient detail to demonstrate the relevance of such experience and education.
 - b. Emphasis should be placed on the experience of the firm over the individual employees;
 - c. Demonstrate knowledge of historic preservation.
 - d. Provide one brief summarized facilitation experience that included public participation and prioritized planning efforts. This example at should include:
 - i. A brief summary of the facilitation subject matter and start/end dates of when the project was successfully completed;
 - ii. What, if any, significant challenges were faced during the facilitation and what steps were taken to overcome such challenges;
 - iii. A brief summary of the resulting outcomes achieved at the conclusion of each facilitation.
 - iv. Include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
2. **Experience of Proposed Personnel Assigned to Provide Services.** The proposal should describe the education and experience of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel.

3. **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.
 - a. Include an overview of the methodology to be used when facilitating the five regional workshops and one stakeholders workshop, based on staff and time frames, to meet the project deadline;
 - b. Describe how information gathered from the five regional workshops will be summarized and submitted to the SHPO;
 - c. Summarize how the final report will be developed and submitted to the SHPO for use in drafting a vision statement, preservation goals, and historic resource assessment.
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 (based on State of Michigan per diem rates). Description should include when and why lodging is needed.
- c. Meal costs (based on State of Michigan per diem rates). Description should include when and why meals are needed.
- d. Transportation costs (based on standard State of Michigan mileage rate). Description should include type and reason for transportation cost.
- e. Costs of supplies and materials. Description should include items to be purchased and reason for purchase.
- f. Other direct costs. Description should include items to be purchased and reason for purchase.
- g. Total Budget.

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

12. 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.

Include a timetable indicating how the project will be scheduled. The timetable should include at a minimum: the pre-planning meeting, the five regional

workshops, one stakeholder meeting, submittals of workshop summaries, submittal of quarterly reports, and submittal of the final report.

<i>Completed Service/Project Components</i>	<i>Estimated Completion Dates</i>

13. 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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14. **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 SHPO Five Year Plan.

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

By: _____

Its: _____

Date: _____

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

EXHIBIT D

PROJECT PERSONNEL

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

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

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

Title with Contractor/Subcontractor _____

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

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

Title with Contractor/Subcontractor _____

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

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

Title with Contractor/Subcontractor _____

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

Name of Signatory for Contractor/Subcontractor:

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

Its: _____

Signature: _____

Federal Identification Number: _____

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