



REQUEST FOR PROPOSALS

DATE OF ISSUE: July 22, 2019

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for Building Michigan Communities Conference Planning Services**

Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	August 9, 2019	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	August 16, 2019	
Proposal deadline:	August 30, 2019	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	November 1, 2019	

I. Services Sought by Authority

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

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

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

II. Contents of this RFP

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

III. Overview

The Authority seeks a conference planner (“Bidder” or “selected contractor”) to assist the Authority with the planning and hosting of the Building Michigan Communities Conference (“BMCC”).

By way of background, the Authority’s core mission is to provide financial and technical assistance through private and public partnerships to create and preserve safe and decent affordable housing. To accomplish this mission, the Authority has established numerous programs that include funding for multi-family housing, mortgages for single-family housing, efforts to end homelessness, homeownership counseling, neighborhood enhancements, and other housing programs. The Authority works with a number of partners to further the mission. One of the partnership efforts that supports these programs and this mission is the annual Building Michigan Communities Conference.

The BMCC draws over 1,300 attendees representing developers (nonprofit and for-profit), investors, lenders, builders, homeless service providers, housing counseling agencies, and housing agencies (state, county, and local). The conference offers informative educational sessions covering real estate development, preventing and ending homelessness, social and supportive services, community economic development, organizational best practices, and other related topics. It also offers networking opportunities that can strengthen existing relationships and create new partnerships that can endure beyond the conference.

Previous conferences have started on Monday (sometimes early morning, sometimes at lunch) and lasted until Wednesday lunch or mid-afternoon. A possible schedule could be as follows:

Monday

Pre-Conference Session: 10:00am – 11:30pm
Kickoff Lunch: 11:30pm – 1:15pm
Breakout Sessions: 1:30pm – 3:00pm
Networking Break: 3:00pm – 3:13pm
Breakout Sessions: 3:15pm – 4:45pm
Reception: 5:00pm – 7:00pm-ish

Tuesday

Breakfast: 7:30am – 8:30am
Breakout Sessions: 8:30am – 10:00am
Networking Break: 10:00am – 10:10:15am
Breakout Sessions: 10:15am – 11:45pm
Lunch: 11:45am – 1:15pm – Awards Ceremony
Breakout Sessions: 1:30pm – 3:00pm
Networking Break: 3:00pm – 3:15pm
Breakout Sessions: 3:15pm – 4:45pm

Wednesday

Breakfast: 7:30am – 8:30am
Breakout Sessions: 8:30am – 10:00am
Networking Break: 10:00am – 10:15am
Breakout Sessions: 10:15am – 11:45am
Lunch – 11:45am – 1:15pm – Closing Keynote Speaker

Based upon past history, there can be between 7 and 12 breakout sessions occurring during each session time slot. Future conferences may differ, depending upon the results of the planning efforts.

IV. Objectives, Tasks & Activities

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

The selected contractor will provide, as needed, planning services that may include some or all tasks and activities required to execute the BMCC. The selected contractor will complete the duties as described below, in a timely manner to ensure that activities will be carried out in a manner to achieve a successful conference (i.e., smooth registration, appropriate room set-up, helpful materials (paper and/or electronic), positive and inviting exhibitor room layout, etc.).

- B. Requirements.** The selected contractor will manage the overall planning, organization and implementation of the Building Michigan Communities Conference.

Duties will include, but may not be limited to, working collaboratively with appropriate Authority staff and partners (together they comprise the “Committee”) in pre-conference planning, administering participant registration, venue logistics and management, sponsorship and exhibitor support, panelists and speaker support, marketing, on-site support, conference evaluations, post conference support, financial services, and reporting. The primary contact will be the BMCC Planning Committee Chairperson. Detailed objectives, tasks, activities, etc., related to this request are outlined below.

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

- C. Objectives, Tasks & Activities.** The selected contractor will provide services and staff, and otherwise do all things necessary to the performance of work as provided below. The Authority will use the selected contractor’s services to perform some or all following tasks in the planning and execution of the BMCC. The lists of services to be performed will ultimately be determined BMCC in consultation with the selected contractor and the BMCC Planning Committee Chairperson.

1. Pre-conference planning – The selected contractor will:

- a. **Timeline.** Prepare an outline of activities, timeline and deliverables. The selected contractor will update and maintain the project timeline, as well as track responsibilities and deadlines of all parties involved in the BMCC. Support the Committee as it develops program content to ensure full development in accordance with overall timelines;
- b. **Budget.** In consultation with the BMCC Planning Committee Chairperson, establish a budget for the BMCC.
- c. **Site Selection.** The Lansing Center is already selected as the venue for the 2020 BMCC. If requested for future conferences, the selected contractor will research (which may include site visits to potential venues) potential BMCC venues, to include evaluation, assessment and availability of state facilities, according to the specifications provided by the Authority. The selected contractor will solicit quotes and prepare a comparison and recommendations on the choice of venue. The selected contractor will

negotiate contracts for BMCC space, food and beverage services, and lodging for BMCC participants.

- d. **Committee Coordination.** The selected contractor will attend (in person or via conference systems) monthly or quarterly meetings with the Committee, take meeting notes if requested and distribute those notes to Committee members.
- e. **Session Proposals.** The selected contractor will create and maintain an online session proposal form and an online session manager site for input of sessions.
- f. **Continuing Education Credits.** Coordinate with the governing body, sign-in and sign-out sheets, tabulations of credits, and sending certificates to participants.
- g. **Database Management.** The selected contractor will serve as the overall administrative coordinator for BMCC database management ensuring it is up-to-date, including new requests and editing “bad addresses” for mailings.
- h. **Conference App.** The selected contractor will ensure there is a mobile app (compatible with Apple and Android devices) that can be used for registration, session listing, and other uses as requested by the Committee.
- i. **Conference Scholarships.** Coordinate, as appropriate, system for obtaining and administering registration and expense scholarships to an agreed-to number of organizations. Act as the central liaison for all scholarship recipients, coordinating at least two mailings, fielding phone calls and tracking recipient expenses.
- j. **Subcontracts.** If appropriate, the selected contractor will research, competitively bid, identify and negotiate contracts with outside vendors and sponsors. This may include but is not limited to graphic designers, printers, transportation services, venues for social events, parking, entertainment, exhibit set-up, computer and copying equipment, audio visual, soft seating, flowers, transportation, award videos, and others required for the BMCC.
- k. **Brochures and materials.** Develop and produce a conference registration brochure, on-site program, awards booklet if requested by the Committee, signage, etc. In consultation with the selected venue, obtain and arrange for the display of all appropriate on-site signs, markers, banners, etc., required for the BMCC. Order basic items including but not limited to conference bags, name badge stock, name badge holders, ribbons, lanyards, etc.
- l. **Awards.** The selected contractor will, in consultation with the Planning Committee, write the profile for the award(s) winner(s), including interviews of award recipient(s), writing and editing the award. Coordinate framing and engraving of the Duvernay Award. (Presented in memory of Terrence R. Duvernay, former MSHDA Executive Director, the Duvernay Award goes to a person who reflects both the ideals and personal qualities of Mr. Duvernay. The award recipient receives a painting of Mr. Duvernay from an artist commissioned by the Authority). Contractor will work with Committee to plan and coordinate the timing of the award presentations. Contractor will arrange for award videos and posters, if requested by the Committee.
- m. **Moderator Training.** The selected contractor will provide session moderator training to Committee members to assure sessions run smoothly for panelists and attendees

2. Registration

- a. Design and layout of full-color pre-registration brochure including letterhead folder, etc., with print and mailing coordination.
- b. Disseminate registration materials to conference contact list.
- c. Post online registration pages on an external accessible website for use by attendees registering for the BMCC.
- d. Receive registrations and payments from registrants via mail, fax and online; provide registrants with receipts for payment.
- e. Enter all data (manually enter from hard-copy submissions and download all online registrations) and maintain database of participant information
- f. Update the online registration system for the BMCC, as needed. The selected contractor will be responsible for the oversight and maintenance of the registration system. The selected contractor will provide for the ability for attendees to pay by credit card, PayPal, etc., as well as traditional, "paper" registration, if necessary. Both forms of registration and payment options should be available for pre-registration, as well as on-site registration the day(s) of the BMCC.
- g. The selected contractor will provide pre-registration and final registration reports as requested by the Authority.
- h. The selected contractor will serve as the primary liaison to all registrants and speakers, including but not limited to sponsors and exhibitors if and when appropriate, and will be available via email, phone/video conference to answer questions and problem-solve all BMCC-related registration issues that may develop.
- i. Develop, produce and distribute, in collaboration with the Committee, confirmation materials for BMCC registrants (e.g., mail and email confirmation to registrants), including changes to registration confirmations

3. Venue Logistics and Management.

- a. Work with venue and outside service providers to provide carpeting, furniture, backdrops, staging, flowers & plants, pipe & drape, signage, etc.;
- b. Work with venue to ensure accessibility so that everyone can participate fully, including people with disabilities and sensory or neurological differences;
- c. Catering selection and oversight, ensuring best meals and breaks possible for participants, including taste testing of mainstream menu options, as well as vegetarian and other dietary restricted foods; Review banquet orders from the venue to ensure accuracy, then edit and sign corrected orders. Place final guaranteed numbers of guests for all meals and breaks;
- d. Plan for any off-site events including hiring of caterer, ordering of tables, chairs, food, special meals, etc.;
- e. Arrangement of all decorating, audiovisual and room set-up requirements. Obtain audiovisual needs from conference presenters, place orders and manage on-site to add or cancel audiovisual equipment as necessary; work within budgeted amount ordering on-site computer equipment, fax and copy machines as necessary. To include break out rooms, exhibit hall, and main hall (meals and keynotes).
- f. Maintenance and oversight of guest room lists;
- g. Arrangement for and oversight of a master account for speaker and staff charges at the hotel;
- h. Arrange for on-site parking for attendees
- i. All pre-BMCC liaison and follow-up with venue vendors;
- j. On-site liaison with the facility and all vendors during the BMCC;

- k. Work with venue to assure appropriate number and layout of breakout rooms, and to meet a/v needs of panelists.
- l. Be onsite the day prior to the conference start to assure the registration area, exhibit hall, main hall and staging, and other logistics are appropriately ready for the start of the conference.

4. Sponsors and Exhibitors

- a. Work with the Committee to solicit sponsors and exhibitors for the BMCC, including development of sponsor and exhibitor benefit packages if appropriate. Develop a sponsor list and handle all mailings (electronic and hard-copy) to entire sponsor list.
- b. Determine floor plan and booth assignments.
- c. Follow-up pertaining to sponsorship commitments.
- d. Development of Sponsor PowerPoint Presentation for General Sessions including all project management, design, photo enhancement and production layout.
- e. Development of sponsorship packets, including design, layout, copywriting and sponsorship level breakdown.
- f. Following the conclusion of the BMCC, prepare and distribute thank-you letters to sponsors.

5. Panelists and Keynote speakers

- a. Assist in collecting all contact information for panelists, moderators, keynotes and speakers (“Speakers”) for all sessions.
- b. Establish and maintain an online session manager; coordinate and post Speaker handouts, biographies and contact information on website.
- c. Work with the Committee to confirm Speakers for the BMCC (anticipated is a minimum of 2 speakers). Serve as the primary liaison to the Speakers, confirming all details of their participation, including contracts with Speakers, BMCC registration, travel and lodging arrangements in accordance with pre-approved State of Michigan travel policy, honorariums, session titles and descriptions, disclosures, and obtaining all relevant releases, information and materials (e.g., biographies, hand-outs, audiovisual requirements, etc.), and all other logistical and programmatic arrangements. The Authority will provide guidelines with regard to an overall line item amount for fees and expenses for Speakers for each BMCC.
- d. Coordinate registration, reimbursement processes, complimentary registration forms, audiovisual requests, and logistical assistance to Speakers, etc. Follow-up with confirmation as appropriate, including any packets and information related to the BMCC.
- e. Serve as primary contact for Speakers etc., regarding their BMCC needs.
- f. Following the conclusion of the BMCC, prepare and distribute thank-you letters to Keynote Speakers and panelists, including results of evaluations, etc., as appropriate.

6. Marketing. Consult and work with the Committee to compose and edit text required for marketing materials; develop camera-ready copy and graphics with the assistance of graphic designers (if appropriate); arrange for the printing (if appropriate); distribution and electronic posting of materials.

- a. It is anticipated that a minimum of two marketing pieces would be developed for the BMCC.

- b. If requested by the Committee, competitively bid, negotiate and contract with vendors to provide video-recording services at the BMCC in accordance with specifications provided by the Committee.
- c. If requested, support the Authority's communications staff in pre- and post-conference media relations, assisting with overall media relations and development of public relations materials (e.g., press releases, press kit, daily news, etc.), and handle media logistics.
- d. Review marketing materials to ensure diverse representation.

7. On-site Support.

- a. Provide on-site support during the BMCC for registration, audiovisual, meeting room setup, as well as sponsor and exhibitor management. This may include using Authority staff to assist in the effort.
- b. Manage the BMCC on-site, serving as a liaison to the venue, participants, exhibitors and speakers. The selected contractor will provide staff as needed to manage the registration desk, oversee all room set-ups and audiovisual arrangements, and organize and oversee volunteers from the Authority and participating partner organizations. The selected contractor will provide staff to serve as room monitors and will provide training and support to moderators (selected from the planning committee organizations). The selected contractor will work with the Committee to organize and, as appropriate, instruct on-site staff with regard to their BMCC-related responsibilities. The selected contractor will ensure a timely and organized conference flow.
- c. As necessary, provide staff to conduct on-site registration which will consist of printing a name tag for each on-site registrant on stock, collecting registration fees, and assisting volunteers with distributing conference materials (e.g., tote bag, conference information/schedule, etc.).

8. Conference Evaluations. Design and administer session and overall conference evaluations. Design evaluations to be done wither through written forms or electronically, distribute to attendees, collect and merge data, and report on (a) overall conference evaluation and (b) individual session evaluation. Send evaluations to survey service (e.g., Survey Monkey) to be received within 48 hours of the conclusion of the conference, and a follow up survey 1 to 2 weeks later. Survey results to be provided to the Committee for preliminary planning for the next year's conference.

9. Post Conference support

- a. Provide BMCC follow-up services, including production and distribution of "thank-you" notes to speakers and volunteers. Review all financial transactions and post-BMCC liaison with the venue, other vendors, etc.
- b. Final Report. Prepare a final report on the BMCC, including registration and financial data, what worked and what didn't work for the BMCC, and provide recommendations for future BMCCs.
- c. All post-BMCC liaison and follow-up, including review of the venue invoice.

10. Financial Services.

- a. The selected contractor will establish a separate bank account for the BMCC and receive registration payments from BMCC attendees, sponsors and exhibitors. The selected contractor will provide up-to-date accounting and appropriate receipts for payment.

- b. Issue payments from registration fees to other vendors for services connected with the BMCC as requested and authorized by the Authority.
- c. Maintain financial records for the BMCC.
- d. Provide monthly and/or quarterly budget reports, as requested by the Authority.
- e. Review, approve and pay all BMCC invoices for which the selected contractor has primary oversight, including but not limited to contracts for parking, entertainment, exhibit set-up, computer and copying equipment, audio visual, soft seating, flowers, and transportation.

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

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

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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 BMCC 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. Preferences. Michigan law accommodates some bidder preferences:

1. Michigan Based Business

All other things being equal, the state of Michigan must give preference to products manufactured or services offered by Michigan-based firms. See MCL Section 18.1261 (<http://legislature.mi.gov/doc.aspx?mcl-18-1261>) and Section 18.1268 (<http://legislature.mi.gov/doc.aspx?mcl-18-1268>).

2. Geographically-Disadvantaged Business

All other things being equal, the state of Michigan must give preference to products manufactured or services offered by a Geographically-Disadvantaged Business Enterprise. It is the goal of the State that 3% or more of contract payments each state fiscal year will be made to certified Geographically-Disadvantaged Business Enterprises by the 2022-23 fiscal year. See Executive Directive 2019-08 (https://www.michigan.gov/whitmer/0,9309,7387-90499_90704-486613--,00.html).

3. Qualified Service-Disabled Veteran-Owned Businesses

It is the goal of the State to award 5% of total state expenditures for construction, goods, and services to qualified service-disabled veteran-owned businesses. The State provides a 10% pricing preference for businesses owned by qualified-disabled veterans. See MCL Section 18.1241 (<http://legislature.mi.gov/doc.aspx?mcl-18-1241>) and Section 18.1261 (<http://legislature.mi.gov/doc.aspx?mcl-18-1261>).

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

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

H. 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.

I. 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.

- J. 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.

- K. 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.

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

- M. 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 August 9, 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 **August 16, 2019**. The Authority will hold no other question sessions or bidder's conferences.

B. Delivery of Proposal. Address questions using the subject line ***BMCC Conference Planner*** to:

MSHDA-Procurement@michigan.gov

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

II. Submission of Proposal

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

A. Due Date. Proposals responding to this RFP are due **August 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.

B. Originals and Copies. Submit **one (1) .pdf** version of a proposal via email outlining how the Bidder will provide the activities / services described in the Scope of Work.

C. Delivery of Proposal. Direct all deliveries to:

MSHDA-Procurement@michigan.gov

Confirmation of Delivery. The Procurement Office will verify receipt of email and proposal to the Bidder within 24 hours. If Bidder has not received verification, the Bidder should verify the email address 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.

The Authority will select the proposal based on an evaluation of proposals measured against Selection Criteria provided below.

A. Selection Criteria (Relevant experience with conferences that are comparable in size and complexity to the BMCC).

- | | | |
|-----|---|-------------|
| 1. | Experience designing and planning conferences of comparable size and complexity | (20 Points) |
| 2. | Experience designing, producing, and disseminating registration materials and managing conference registrations for conferences of comparable size and complexity | (20 points) |
| 3. | Experience with venue logistics and conference management | (20 Points) |
| 4. | Experience managing sponsors, exhibitors, panelists and keynote speakers | (20 Points) |
| 5. | Marketing experience | (10 Points) |
| 6. | Experience with handling on-site support | (20 Points) |
| 7. | Experience with conference evaluations and post conference support | (15 Points) |
| 8. | Experience providing financial services and reporting | (15 Points) |
| 9. | Communication skills, including clarity of proposal, fully addressing how the Bidder will provide coordination of the BMCC as provided in this RFP, including clarity of costs per service provided | (25 Points) |
| 10. | Adequacy of proposed methodology, staffing, and time frames for performing services provided | (25 Points) |
| 11. | Overall cost of services | (10 Points) |

Total Possible Points: 200 Points

B. Selection Process. Proposals will be reviewed and scored using the above selection criteria. The Authority's Evaluation Committee may make a decision based solely on that review. It may, however, decide to invite some applicants in for a presentation and followed by a Question and Answer (i.e., "interview") period, and then make a final decision based upon that session. It is anticipated that the presentation and interview will last for approximately 1-hour.

NOTE: The Authority may utilize all proposals, including pricing information, without regard to a proposal's technical score to determine fair market value, when comparing and negotiating prices. The Authority is not obligated to accept the lowest price proposal.

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

D. Cancellation of Selected Proposal. The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-see 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.
4. **Submit a Certificate Verifying Project Personnel.** The form is found in Exhibit D, attached and incorporated into this RFP.
 - a. Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan. Review Exhibit A, Section I.I above for important information regarding Pensioned Retirees.

C. Experience.

1. **Prior Experience of Bidder.** Indicate prior experience of your organization that you consider relevant to the successful accomplishment of the project described in this RFP.
 - a. Include sufficient detail to demonstrate the relevance of such experience.
 - b. Include descriptions of qualifying experience, including project descriptions, costs, and start/end dates of projects successfully completed.
 - c. Include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
 - d. The Authority has identified the following as necessary for the successful performance and completion of the services described in the Scope of Work:
 - i. Have experience providing BMCC or comparable conference planning services; and
 - ii. Have experienced personnel to perform the services, or have personnel supervised by experienced staff.
2. **Experience of Proposed Personnel Assigned to Provide Services.** The proposal should describe the education and experience of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel.
3. **Examples of Work.** The following examples of recent work shall be submitted with the Bidder's proposal:
 - a. Examples of planning services that reflect the versatility of your business in planning conferences using different technologies and planning approaches.
 - b. Examples could include sample publications, website screen shots, survey results, etc., etc.
4. **Professional References.** Include professional references who can provide information regarding the Bidder's prior past performance.

5. **Additional Information and Comments.** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

D. Proposed Services.

1. **How Services Will be Rendered.** Address and describe the process used to render the services and how the services will be rendered. This should be an overview of the methodology to be used, based on staff and time frames, to meet the project scope of work and complete the required services within the time frame of the project.
2. **Use of Subcontractors.** If any work will be subcontracted, describe the following:
 - a. Work that will be subcontracted.
 - b. The process used to select the subcontractors.
 - c. The subcontractor's experience and expertise.
 - d. The names of the firms/individual(s) who will perform the subcontracted work.
 - e. How quality of service will be monitored and ensured.
3. **Standards.** Describe or address the following:
 - a. The standards that the services will satisfy. (If standards of a professional association will be followed, identify the standards and the association.)
 - b. How quality of service will be monitored and ensured.
 - c. Whether "best practices" will be followed. (If applicable, identify the organization and/or document establishing such standards.)
4. **Security of Data.** If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:
 - a. Has your organization established and used a policy to address the security of paper and electronic data?
(Yes / No)
If No, explain how your organization addresses the security of paper and electronic data.
(Note: Please do not submit a copy of your security policy.)
 - b. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your firm's policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)
(Yes / No)
If No, explain how your organization handles confidential and/or personal data.
5. **Copyrighted Materials.** Acknowledge and/or confirm the following:
 - a. You agree that any and all products produced as a result of this contract shall be the property of the Authority.
 - b. You agree that the Authority shall (a) hold a copyright on all materials or products produced under the contract and (b) be allowed to file for a copyright with the United States Copyright Office.
 - c. You acknowledge that submitted documents will not contain in part or whole copyrighted materials.

E. Price Proposal & Budget

- 1. Price Proposal.** All rates quoted in proposals submitted in response to this RFP will be a firm fixed price for the duration of the contract. No price changes will be permitted.

Out-of-pocket travel expenses (such as lodging, meals, *standard rate* mileage) are to be reimbursed according to the State of Michigan travel rate schedule, and Authority policy, in effect when the expenses are incurred. State per diem rates are subject to change during the term of an awarded contract. Rates for 2019 can be found here:

http://www.michigan.gov/documents/dtmb/Travel_Rates_FY19_Jan_2019_641067_7.pdf

- 2. Budget.** Include in the proposal a line item budget identifying all expenses related to the work to be performed. By submitting the bid, the Bidder acknowledges that it bears the risk that its expenses may exceed the proposed amount. The budget should include applicable items, which may include the following:

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

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

Include a timetable indicating how the project will be scheduled.

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

G. Disclosures.

- 1. Interests in Authority Programs.** Authority programs include, but are not limited to, the Housing Voucher Program, any loans where the Authority is the lender, and any grants made by or administered by the Authority.

- Does the Bidder, its officers, board members, and employees respectively, have any interests in Authority programs?

(Yes / No)

If Yes, please provide their name, title, and the Authority program for which the interests exist.

- b. If the Bidder intends to use independent contractors or subcontractors to render services, do the independent contractors or subcontractors and their officers, board members, and employees respectively, have any interests in Authority programs?

(Yes / No)

If Yes, please provide their name, title, and the Authority program for which the interests exist.

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

- a. Is the Bidder currently under contract and/or been awarded a grant from the Authority?

(Yes / No)

If Yes, please confirm whether any potential conflict of interest will exist if the Authority enters into a contract with the Bidder.

- b. Does the Bidder, its officers, board members, and employees, hold a position with another entity that may be under contract or receiving a grant from the Authority?

(Yes / No)

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

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

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

- a. Does the Bidder, its officers, board members, and employees respectively, have family members who work for the Authority?

(Yes / No)

If Yes, please provide their name and the name of the family member currently employed at the Authority.

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

I confirm that I have submitted this proposal on behalf of

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

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

By: _____

Role: _____

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)