



## REQUEST FOR PROPOSALS

DATE OF ISSUE: February 19, 2020

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for development of 5-year Michigan Statewide Housing Plan with a focus on strategic planning, benchmarking, outreach and community engagement.**

### Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	<del>February</del> <u>March 10, 25,</u> 2020	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	<del>February</del> <u>27</u> <u>March 12,</u> 2020	
Proposal deadline:	March <del>06</del> <u>25</u> , 2020	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	<del>April</del> <u>May</u> 1, 2020	

\*A bidder’s proposal received at 4:00:01 p.m. Eastern is late and subject to disqualification.

### I. Services Sought by Authority

The Michigan State Housing Development Authority (“Authority”) is seeking an organization authorized to do business in Michigan to work with the Authority’s Strategic Planning Team (“SPT”) to complete the second phase of a two-phase strategic planning process. The Authority is issuing a Request for Proposals (“RFP”) to obtain responses from qualified organizations to provide strategic planning that includes outreach and engagement, metrics, benchmarking of sixteen (16) state Housing Finance Agencies (“HFAs”), and research of best practices that will result in a 5-year Michigan Statewide Housing Plan (“SHP”).

Michigan law allows for qualified disabled veterans/service-disabled veteran owned business (QDV/SDVOB) preference only; however, women-owned, minority-owned, and small businesses authorized to conduct business in the State of Michigan are encouraged to submit proposals.

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

## **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 – Pricing
- Exhibit E – Project Personnel Form

## **III. Overview**

The Authority is seeking a firm to work with the Authority’s SPT to complete the second phase of a two-phase strategic planning process. The Authority is issuing a RFP to obtain responses from qualified organizations to provide strategic planning that includes outreach and engagement, metrics, benchmarking of sixteen (16) state Housing Finance Agencies (“HFAs”), and research of best practices that will result in a 5-year Michigan Statewide Housing Plan (“SHP”). The selected firm will also be responsible to become familiar with several key documents (see list under VI. Tasks, A.3.i.).

Phase One of the Authority’s planning efforts focused primarily on gathering feedback from internal staff around the Authority’s mission, vision, guiding principles, and strategic focus areas. Staff were surveyed, a one-day planning session was held, and three work group meetings conducted. The Authority is also working closely with the Michigan Department of Labor and Economic Opportunity (LEO) aligning its work with LEO’s strategic focus areas. This phase also included two focus group meetings with close partner organizations to learn more about housing trends, usability and impact of program offerings, and possible program changes to better meet the housing demands of Michigan residents. The information captured from these activities will be made available to the selected firm.

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

## **IV. Background**

The lack of safe and affordable housing in Michigan is an economic development barrier, a strain on household finances, and in many cases, results in too many families struggling to afford basic necessities. Additionally, the lack of workforce housing is becoming a barrier for businesses seeking to relocate to or expand in select regions in Michigan. It is vital to develop strategies that strengthen neighborhoods and communities grappling with barriers within Michigan’s housing continuum. Michigan’s housing continuum can be thought of as stretching from those experiencing homelessness to homeownership. There is a strong correlation between income/assets and where an individual and/or household appears along the continuum. The segments along the housing continuum are: 1) Emergency shelter, 2) Supportive housing, 3) Rental housing, and 4) Owner-Occupied housing. Many low-income families struggle to find affordable housing, and homelessness is becoming more widespread and significantly impacting marginalized communities.

The Authority understands that addressing the affordable housing crisis in Michigan is a complex task and recognizes the need to integrate efforts of many partners (e.g., housing developers, homeless service providers, lenders, municipalities, state and federal agencies, non-profit organizations, health and human services agencies, etc.). Opportunity gaps exist along the lines of income and economic status, race and ethnicity, sexual orientation, language, culture, geography, etc. Therefore, the facilitated planning process should be designed to encourage participants to think and identify housing strategies and recommendations through an equity lens. An equity lens is a process for analyzing or diagnosing the impact of the design and implementation of policies on under-served and marginalized individuals and groups to identify and potentially eliminate barriers. The strategic planning process should allow for a focus on eliminating disparities and supporting solutions so that all people have access to safe, decent, and affordable housing.

The SHP is intended to be a guiding document and implementation tool for the Authority to set annual goals and measure outcomes based on the policy direction set forth in the SHP. The SHP will provide a reliable reference and messaging tool for policymakers, affordable housing providers, local governments, advocates, and many others.

The Authority will utilize the information gathered from community outreach and engagement efforts related to housing needs to inform the State of Michigan's Consolidated Plan and Analysis of Impediments to Fair Housing Choice Plan.

The Authority anticipates that the project will be completed by late summer 2020.

## **V. Objective**

Create a 5-year SHP for Michigan.

- A. The firm will be responsible for working with SPT in drafting the SHP, editing, infographics, and the plan will include, but is not limited to the following components:
1. Identify status of current housing conditions in Michigan for an array of income levels and populations. Information should denote housing needs including demographic data, economic trends, housing inventory, and needs by region and population.
  2. Environmental scan that denotes available funding sources to develop and preserve affordable housing and existing gaps in resources.
  3. Denote policies and incentives that impact the development and preservation of affordable housing and the delivery of services to households that experience or are at risk of experiencing homelessness.
  4. Incorporate both qualitative and quantitative research, using an evidence-based approach for setting priorities and strategies.
  5. Include the Authority's vision, mission, guiding principles, and strategic focus areas.
  6. Outline policy priorities, housing investment strategies, goals, metrics, implementation and communication plan for the Authority.
  7. Make recommendations as to how the Authority should refine its strategies and goals
  8. Identify benchmarks or milestones to help measure the Authority's success in implementing the SHP.
  9. Denote best strategies for investment based on needs and resources.

10. An implementation strategy which includes addressing gaps in funding, how to best meet objectives, and serve the public.
11. Identify web-based platforms equipped to track progress made on action items/tasks and against performance measures.

## VI. Tasks

### A. Strategic planning

1. Initial meeting with SPT.
2. Develop work plan timeline.
3. Review the Authority's Phase I Strategic Planning Report including Mission, Vision, and Guiding Principles, The selected firm is directed to review the "[Michigan Homeownership Study – March 2019](#)", "[Michigan Statewide Housing Needs Assessment – April 2019](#)", "[End Homelessness in Michigan – 2018 Annual Report](#)", "[MSHDA Production Report 2018](#)", "[ALICE in Michigan: A Financial Hardship Study](#)" and other pertinent information.
4. Development of Outreach and Engagement Strategy.
  - i. Coordinate, facilitate, and conduct 1-2 public meetings in each of the ten (10) [State of Michigan Prosperity Regions](#).
  - ii. Coordinate, facilitate, and conduct stakeholder/customer group information gathering sessions statewide. Information gathering sessions to include non-traditional Authority partners (e.g., public safety, health care providers, employers, educational institutions, etc.).
  - iii. Coordinate, facilitate, and conduct equitable outreach to direct Authority customers (e.g., residents of Authority-funded multi-family developments, homebuyers with Authority first mortgages, individuals and families receiving homeless assistance, etc.).
  - iv. Utilize a vendor provided web-based interactive tool to disseminate and collect information from the public.
  - v. Responsible for logistics, materials, and marketing, for diverse audiences.
5. Analyze and consolidate all data and information gathered from the planning documents listed above, results from the outreach and engagement, and any other pertinent information needed to create the SHP.

### B. Benchmarking and research

1. Conduct a comparative analysis benchmarking study for the Authority to the following sixteen (16) HFAs ("the HFAs"): Colorado, Illinois, Indiana, Iowa, Louisiana, Maryland, Massachusetts, Minnesota, Missouri, North Carolina, Ohio, Oregon, Pennsylvania, Virginia, Washington, and Wisconsin.
  - i. Research strategies, tactics, resources, programs, services and organizational structure of the 16 HFAs identified above. Provide an analysis of similarities and differences of the 16 HFAs providing comparisons and contrasts to the Authority. Where applicable to the 16 identified HFAs, provide a benchmarking study including metrics and best practices for emergency shelter, supportive housing, rental housing, and owner-occupied housing employed by the identified HFAs.

- ii. Analyze the Authority’s Strengths, Weaknesses, Opportunities, and Threats (“SWOT”) and provide a summary based on the factors researched and any other critical considerations.
- iii. Strategies, program, and services comparison.
  - 1. Provide an overview of the similarities and differences of the HFAs’ strategic visions, goals, strategies, and metrics.
  - 2. Review the HFAs’ programs and services to identify their similarities and differences and examine how the usage of each has been changing over the last few years. Provide an assessment of which programs and services will be dominant over the next five years. Outline which programs and services are providing each HFA with competitive advantages or disadvantages and explain why.
  - 3. Identify program parameters and initiatives designed to assist contractors in understanding, meeting, and/or exceeding federal equal employment opportunity (EEO) goals allied with Federal and federally assisted construction contracts. Provide an assessment of efforts (e.g., development incentives, contractor outreach, training programs, etc.) to broaden the pool of qualified candidates to include minorities and women.
- iv. HFA organizational structure and resources comparison.
  - 1. Provide a structure overview and comparison of each HFA.
    - a. Analyze what functions are undertaken by other state departments, private corporations, public-private partnerships and regional organizations. Compare the relative centralization of operations. Identify the advantages and disadvantages that result from these structures and review what implications they have for their strategies, programs, and services.
  - 2. Analyze the monetary (public and private) resources available to each HFA.
    - a. Provide background on how each HFA is funded and identify the sources of funds.
    - b. Analyze the size of annual operating and discretionary programmatic budgets.
      - i. Provide a breakdown of how the resources are spent. Specifically, analyze what services and programs each HFA invests in and at what level. Identify which funds are devoted towards new spending and what funds are devoted towards legacy programs.
      - ii. Forecast the size of the annual budgets for the comparison HFAs for the next five years.
      - iii. In addition, forecast for the next five years, how much potential incentive dollars are available on an annual basis to each HFAs through:
        - Annual appropriations;

- Legislatively created tax credit programs; and
  - Other incentive programs that do not require annual appropriations.
2. Identify innovative zoning and land-use reforms that cities and other local governments are using to improve housing affordability and access to opportunity.
    - i. Including but not limited to the sixteen (16) HFAs listed in B. 1.
    - ii. Identify what steps Michigan, including risks and/or challenges, would have to take to allow the innovative zoning and land-use reforms
  3. Conduct research study identifying trends within the housing development industry and best practices.
    - i. Including but not limited to the sixteen (16) HFAs listed in B. 1.
    - ii. Identify best practices and innovation for affordable housing from a strategy, program, structure and resources perspective and review how these efforts are measured.
    - iii. Identify strategies, initiatives, and programs designed to close opportunities gaps for underserved populations including but not limited to race, gender, disability or genetic information, religion, age, weight, geography, marital status, socioeconomic status, LGBTQ+.
    - iv. Review the current or emerging trends in affordable housing and identify how each HFA or its state is taking advantage of these trends – provide analysis on which states are leading, which states are lagging, and why.

**VII. Deliverables**

- A 5-year SHP for Michigan
- Strategic Planning workplan and timeline
- Outreach and engagement strategy, including related materials
- Benchmarking Study
- Research Study identifying trends within the housing development industry and best practices

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

**EXHIBIT A**

**NOTICE TO BIDDERS**

**I. Notifications to Bidders**

- A. Revisions to RFP.** If, prior to the proposal deadline, the Authority deems it necessary to provide additional clarifying information, or to revise any part of the RFP, supplements or revisions will be provided to all Bidders who have indicated they will submit a proposal. Proposals will then be evaluated based on the terms and conditions of the RFP, any supplements or revisions to the RFP, and the answers to any written questions.
- B. Organization Authorized to Transact Business in Michigan.** The Bidder must be either a Michigan entity (limited partnership, Limited Liability Company, for-profit corporation or non-profit corporation, etc.) or, if foreign, authorized to do business in the State of Michigan.

**Proposals from Sole Proprietors Will Not be Accepted**

Questions regarding specific requirements to transact business in the State of Michigan should be referred to or otherwise contact the Michigan Department of Licensing and Regulatory Affairs, Corporations, Securities & Commercial Licensing Bureau at:

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

- C. Minimum Internet/Technological Capabilities.** The Bidder must have phone, internet, and e-mail access. Internet and e-mail access must be adequate to allow the Bidder to receive, download and upload data, files and attachments from Authority staff. (Current state standards are limited to a functional size of 20 MB).
- D. Limits on Liability & Indemnification.** The Bidder must review and acknowledge that the Authority will require the Bidder to satisfy the following requirements prior to the execution of a contract with the Authority. If the Bidder has objections, please provide an explanation with your proposal outlining the objection.

If awarded a contract, the Bidder agrees to:

1. Indemnify, defend and hold harmless the Authority, its Board, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:
  - a. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from (1) the services

provided ("Services") or (2) performance of the Services, duties, responsibilities, actions or omissions of the Bidder or any of its subcontractors under an awarded contract.

- b. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from a breach by the Bidder of any representation or warranty made by the Bidder in an awarded contract.
- c. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or related to occurrences that the Bidder is required to insure against as provided for in an awarded contract.
- d. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from the death or bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with the performance of services by the Bidder, by any of its subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the Authority.
- e. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents which results from an act or omission of the Bidder or any of its subcontractors in its or their capacity as an employer of a person.
- f. any action or proceeding threatened or brought against the Authority to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service supplied by the Bidder or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United States or foreign patent, copyright, trade secret or other proprietary right of any person or entity, which right is enforceable under the laws of the United States.

**E. Michigan Freedom of Information Act.** All documents submitted to the Authority are subject to the Michigan Freedom of Information Act ("FOIA"). In the event a request for submitted documents is made to the Authority, the Authority's FOIA Coordinator will redact or withhold information and/or documents that are exempt from disclosure under FOIA. See *MCL 15.243 et seq.* Please note that any requests by non-MSHDA personnel to review proposals will be denied until the deadline for submission of the bids has expired. See *MCL 15.243(1)(i)*.

**Please submit FOIA requests to the Authority as follows:**

**MSHDA FOIA Coordinator  
c/o Legal Affairs  
Email: [MSHDA-FOIA@michigan.gov](mailto:MSHDA-FOIA@michigan.gov)**

**F. 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](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 ~~February 25~~**March 10, 2020** at 4 p.m. Eastern Time (Detroit). ***Submissions received at 4:00:01 p.m. Eastern is considered late and subject to disqualification.***

Responses to properly submitted questions will be posted on or around ~~February 27~~**March 12, 2020**. The Authority will hold no other question sessions or bidder's conferences.

**B. Delivery of Proposal.** Address questions using the subject line ***Phase II Strategic Plan RFP*** to:

**MSHDA-Procurement@michigan.gov**

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

**II. Submission of Proposal**

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

A. **Due Date.** Proposals responding to this RFP are due **March 1225, 2020** at 4 p.m. Eastern Time (Detroit). **Submissions received at Submissions received at 4:00:01 p.m. Eastern is considered late and subject to disqualification.**

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.

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

- |    |   |                    |
|----|---|--------------------|
| 1. | Experience, education and/or certification  | (35 Points)        |
| 2. | Communication skills, including clarity of proposal and writing sample              | (25 Points)        |
| 3. | Adequacy of proposed methodology, staffing, and time frames for performing services | (25 Points)        |
| 4. | <u>Reasonableness and feasibility of fee</u>  | <u>(15 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 ~~March 31~~ **April 6**, 2020 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.

**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 samples of housing plans, project workplans with timelines, outreach and engagement strategy documents, public outreach materials with infographics, benchmarking studies, and research studies created by your firm.
  - d. 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 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.

### 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. (See Exhibit D)** 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.

**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](http://www.michigan.gov/documents/dtmb/Travel_Rates_FY18_Jan2018_609896_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:

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

**F. Schedule/Timeline.** 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.

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

**2. Potential Conflicts of Interests.** Potential conflicts of interest may arise from the Bidder’s officers, employees, members, board members, independent contractors

or subcontractors the Bidder will use to render services, if the organization enters into a contract with the Authority.

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

(Yes / No)

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

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

(Yes / No)

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

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

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

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

(Yes / No)

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

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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  
for development of 5-year Michigan Statewide Housing Plan with a focus  
on strategic planning, outreach, benchmarking and (community/public?)  
engagement.**

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**

**PRICING**

1. The Contractor must provide a pricing schedule for the proposed Contract Activities. The pricing schedule should be submitted in a modifiable format (e.g., Microsoft Word or Excel); however, you may also submit an additional pricing schedule in a non-modifiable format (e.g., PDF). Failure to complete the pricing schedule as requested may result in disqualification of your proposal.
2. Price proposals must include all costs, including but not limited to, any one-time or set-up charges, fees, and potential costs that Contractor may charge the State (e.g., shipping and handling, per piece pricing, and palletizing).
3. The Contractor is encouraged to offer quick payment terms. The number of days must not include processing time for payment to be received by the Contractor's financial institution.

Quick payment terms: \_\_\_\_\_ % discount off invoice if paid within \_\_\_\_\_ days after receipt of invoice.

4. By submitting its proposal, the Contractor certifies that the prices were arrived at independently, and without consultation, communication, or agreement with any other Contractor.

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

**EXHIBIT E**

**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: \_\_\_\_\_

