



## REQUEST FOR PROPOSALS

DATE OF ISSUE: September 7, 2022

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for Event Hosting and Planning Services**

### Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	September 14, 2022	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	September 19, 2022	
Proposal deadline:	October 3, 2022	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	November 1, 2022	

**\*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 with the capability to provide comprehensive, solution-focused event planning, coordination, and management services. The selected firm Contractor will have to demonstrate through their proposal their planning, promotion and implementation experience in successfully executing and managing small and large-scale conferences, awards presentations, trade shows, expos and/or theme-based events, with a strong capability to form evident collaborative relationships with all parties.

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.

It is anticipated that a three-year contract may be awarded. The Contract may be renewed for up to two (2) additional one (1) year period(s). Renewal is at the sole discretion of the Authority. Two optional annual renewals may later be awarded at the discretion of the Authority.

### **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’s core mission is to provide financial and technical assistance through private and public partnerships to create and preserve safe and 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 partners representing developers (nonprofit and for-profit), investors, lenders, builders, homeless service providers, housing counseling agencies, and housing agencies (state, county, and local). To train, assist and stay up to date with these partners, various program areas within the Authority host meetings, conferences, resource fairs, and a variety of other live, virtual and hybrid events. The Authority seeks both staffing assistance and industry knowledge necessary to ensure live, virtual and hybrid events are of the best quality.

As an example, one of the partnership efforts that supports Authority programs and its mission is the annual Building Michigan Communities Conference (BMCC). 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 strengthen existing relationships and create new partnerships that endure beyond the conference.

### **IV. Service Requirements**

#### **A. Summary**

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

#### **B. Requirements**

Awarded Contractor 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, contract pricing and negotiation, administering participant registration, venue logistics and management, sponsorship and exhibit or support, panelists and speaker support, marketing, onsite support, conference evaluations, post conference support, financial services, and reporting. The primary contact will be the Planning Committee Chairperson.

It is anticipated that the Contractor will provide support services for events including, but not limited to:

- Asset Management Conference (once per year for one day; summer)
- Homeless Summit (once per year for two days; fall)
- Housing & Resource Fairs (four per year; quarterly)
- MSHDA All-Staff Meeting (once per year; winter)

Additional events may include:

- Groundbreakings/ ribbon-cuttings/ check presentations
- Tours and road shows
- Press conferences/ interviews
- Speaking engagements
- Public forums/ townhall meetings
- Exhibition/ tradeshow participation
- Community celebrations, award ceremonies and open houses
- Association meetings or Breakfasts/ luncheons/ banquets.
- Board Meetings (monthly)
- Homeless Convenings (twice per year; spring and fall)

## **V. Objectives, Tasks, and Activities**

The Awarded 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 Awarded Contractor's services to perform some or all following tasks in the planning and execution of the event. The lists of services to be performed will ultimately be determined in consultation with the Awarded Contractor and the Authority's Planning Committee Chairperson.

### **A. Pre-conference planning – The Awarded Contractor will:**

1. **Timeline.** Prepare an outline of activities, timeline and deliverables. Update and maintain the project timeline, as well as track responsibilities and deadlines of all parties involved in the event. Support the Committee as it develops program content to ensure full development in accordance with overall timelines.
2. **Budget.** In consultation with the Authority's Planning Committee Chairperson, establish a budget for the event.
3. **Site Selection.** The Contractor will research (which may include site visits to potential venues) potential venues, to include evaluation, assessment and availability of state facilities, according to the specifications provided by the Authority. The Contractor will solicit quotes and prepare a comparison and recommendations on the choice of venue. The Awarded Contractor will negotiate contracts for space, food and beverage services, incidental fees and lodging for event participants.
4. **Committee Coordination.** The Awarded 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.

5. **Session Proposals.** The Awarded Contractor will create and maintain an online session proposal form and an online session manager site for input of sessions.
6. **Continuing Education Credits.** The Awarded Contractor will coordinate with the governing body, provide sign-in and sign-out sheets, tabulations of credits, and send certificates to participants.
7. **Database Management.** The Awarded Contractor will serve as the overall administrative coordinator for event database management ensuring it is up to date, including new requests and editing “bad addresses” for mailings.
8. **Conference App.** The Awarded 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.
9. **Conference Scholarships.** The Awarded Contractor will coordinate, as appropriate, a system for obtaining and administering registration and expense scholarships to an agreed-to number of organizations. The Contractor will also act as the central liaison for all scholarship recipients, coordinating at least two mailings, fielding phone calls and tracking recipient expenses.
10. **Subcontracts.** If appropriate and subject to Authority approval, the Awarded 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 event.
11. **Brochures and materials.** If requested by the Committee, the Contractor will develop and produce a conference registration brochure, onsite program, awards booklet signage, etc. In consultation with the selected venue, the Contractor will obtain and arrange for the display of all appropriate onsite signs, markers, banners, etc., required for the event. The Contractor will also order basic items including but not limited to conference bags, name badge stock, name badge holders, ribbons, lanyards, etc.
12. **Awards.** The Awarded Contractor will, in consultation with the Planning Committee, write the profile for the award(s) winner(s), including interviews of award recipient(s), and writing and editing the award. The Awarded Contractor will coordinate framing and engraving of awards. The Awarded Contractor will work with the Committee to plan and coordinate the timing of the award presentations. Contractor will arrange for award videos and posters, if requested by the Committee.
13. **Moderator Training.** The Awarded Contractor will provide session moderator training to Committee members to assure sessions run smoothly for panelists and attendees.

**B. Registration** – The Awarded Contractor will:

1. Design and layout full-color pre-registration brochure including letterhead folder, etc., with print and mailing coordination.
2. Disseminate registration materials to conference contact list.
3. Post online registration pages on an external accessible website for use by attendees registering for the event.
4. Receive registrations and payments from registrants via mail, fax and online; provide registrants with receipts for payment. Forward, deposit or otherwise secure payments as directed by the Authority.
5. Enter all data (manually enter from hard-copy submissions and download all online registrations) and maintain database of participant information
6. Update the online registration system for the event, as needed. The Awarded Contractor will be responsible for the oversight and maintenance of the registration system. The Awarded 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 onsite registration the day(s) of the event.
7. The Awarded Contractor will provide pre-registration and final registration reports as requested by the Authority and the venue provider.
8. The Awarded Contractor will serve as the primary liaison to all registrants, speakers and venue providers, 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 event-related registration issues that may develop.
9. Develop, produce and distribute, in collaboration with the Committee, confirmation materials for event registrants (e.g., mail and email confirmation to registrants), including changes to registration confirmations

**C. Venue Logistics and Management**

The Awarded Contractor will:

1. Work with venue(s) and outside service providers to provide carpeting, furniture, backdrops, staging, flowers & plants, pipe & drape, signage, etc.
2. Work with venue to ensure ADA compliance so that everyone can participate fully, including people with disabilities and sensory or neurological differences.
3. Perform 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.
4. Plan for any off-site events including hiring of caterer, ordering of tables, chairs, food, special meals, etc.

5. Arrange all decorating, audiovisual and room set-up requirements. Obtain audiovisual needs from conference presenters, place orders and manage onsite to add or cancel audiovisual equipment as necessary; work within budgeted amount ordering onsite computer equipment, fax and copy machines as necessary. To include break out rooms, exhibit hall, and main hall (meals and keynotes).
6. Perform maintenance and oversight of guest room lists.
7. Arrange for and provide oversight of a master account for speaker and staff charges at the hotel.
8. Arrange for onsite parking for attendees.
9. Act as pre-event liaison and follow-up with venue vendors.
10. Be onsite liaison with the facility and all vendors during the event.
11. Work with venue to assure appropriate number and layout of breakout rooms, and to meet audiovisual needs of panelists.
12. 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.

**D. Sponsors and Exhibitors** – The Awarded Contractor will:

1. Work with the Committee to solicit sponsors and exhibitors for the event, including development of sponsor and exhibitor benefit packages, if appropriate. Develop a sponsor list and handle all mailings (electronic and hardcopy) to entire sponsor list.
2. Determine floor plan and booth assignments.
3. Follow-up pertaining to sponsorship commitments.
4. Develop Sponsor PowerPoint Presentation for General Sessions including all project management, design, photo enhancement and production layout.
5. Develop sponsorship packets, including design, layout, copywriting and sponsorship level breakdown.
6. Prepare and distribute thank-you letters to sponsors following conclusion of the event.

**E. Panelists and Keynote speakers** – The Awarded Contractor will:

1. Assist in collecting all contact information for panelists, moderators, keynotes and speakers (“Speakers”) for all sessions.
2. Establish and maintain an online session manager, coordinate and post Speaker handouts, biographies and contact information on website.

3. Work with the Committee to confirm Speakers for the event. Serve as the primary liaison to the Speakers, confirming all details of their participation, including contracts with Speakers, event 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 event .
4. 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 event.
5. Serve as primary contact for Speakers etc., regarding their event needs.
6. Prepare and distribute thank-you letters to keynote Speakers and panelists, including results of evaluations, etc., as appropriate, following the event.

**F. Marketing** – The Awarded Contractor will:

1. 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.
2. Competitively bid, negotiate and contract with vendors to provide video-recording services at the event in accordance with specifications provided by the Committee (if requested).
3. 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 (if requested).
4. Review marketing materials to ensure diverse representation.

**G. Onsite Support** – The Awarded Contractor will:

1. Provide onsite support during the event for registration, audiovisual, meeting room setup, as well as sponsor and exhibitor management. This may include using Authority staff to assist in the effort.
2. Manage the event onsite, serving as a liaison to the venue, participants, exhibitors and speakers. The 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 Contractor will provide staff to serve as room monitors and will provide training and support to moderators (selected from the planning committee organizations). The Contractor will work with the Committee to organize and, as appropriate, instruct onsite staff regarding their event related

responsibilities. The Contractor will ensure a timely and organized conference flow.

3. Provide staff as necessary to conduct onsite registration which will consist of printing a name tag for each onsite registrant, collecting registration fees, and assisting volunteers with distributing conference materials (e.g., tote bag, conference information/schedule, etc.).

**H. Conference Evaluations** – The Awarded Contractor will:

1. Design and administer session and overall conference evaluations. Design evaluations to be done either through written forms or electronically, distribute to attendees, collect and merge data, and report on (a) overall conference evaluation and (b) individual session evaluation.
2. 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 to assist in planning future events.

**I. Post Conference support** – The Awarded Contractor will:

1. Provide event follow-up services, including production and distribution of “thank-you” notes to speakers and volunteers. Review/audit all financial transactions and post-event liaison with the venue, other vendors, etc.
2. Prepare a final report on the event, including registration and financial data, what worked and what didn’t work for the event, and provide recommendations for future events.
3. Perform all post-event liaison and follow-up, including review of the venue invoice.

**J. Financial Services** – The Awarded Contractor will:

1. If instructed to do so by the Committee, establish a separate bank account for the event and receive registration payments from event attendees, sponsors and exhibitors. The Contractor will provide up-to-date accounting and appropriate receipts for payment.
2. Issue payments from registration fees to other vendors for services connected with the event as requested and authorized by the Authority.
3. Maintain financial records for the event.
4. Provide monthly and/or quarterly budget reports, as requested by the Authority.
5. Review, approve and pay all event invoices for which the 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.

**K. Reporting Requirements** – The Awarded contractor will submit to the Authority the

following written reports:

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

**Rest of Page Intentionally Left Blank**

**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.

**Rest of Page Intentionally Left Blank**

**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 **September 14, 2022** at **4 p.m.** Eastern Time (Detroit). Submissions received at 4:00:01 p.m. Eastern are late and subject to disqualification.

Responses to properly submitted questions will be posted on or around **September 19, 2022**. The Authority will hold no other question sessions or bidder's conferences.

**B. Delivery of Proposal.** Address questions using the subject line ***Planning and Hosting Services*** 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 **October 3, 2022 at 4 p.m.** Eastern Time (Detroit). Submissions received at 4:00:01 p.m. Eastern is 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  | (50 Points) |
| 2. | Communication skills, including clarity of proposal and writing sample              | (15 Points) |
| 3. | Adequacy of proposed methodology, staffing, and time frames for performing services | (25 Points) |
| 4. | Reasonableness and feasibility of fee   | (10 Points) |

**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 October 17, 2022 via e-mail and posting on the Authority’s website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and the Authority’s Board.

**C. Cancellation of Selected Proposal.** The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. If the Authority

cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals. Reasons for canceling the selected proposal may include, but are not limited to, the following:

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

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

**EXHIBIT C**

**PROPOSAL FORMAT**

**I. Overview**

- Proposals must be submitted in the format described in this Exhibit C as outlined below.
- There should be no attachments, enclosures or exhibits other than those considered by the Bidder to be essential to a complete understanding of the proposal.
- Each section must be clearly identified with appropriate headings 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 3 prior experiences 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.
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.** 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. Current travel information can be found here:

[https://www.michigan.gov/dtmb/0,5552,7-358-82548\\_13132---,00.html](https://www.michigan.gov/dtmb/0,5552,7-358-82548_13132---,00.html)

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.

**Rest of Page Intentionally Left Blank**

**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  
*Planning and Hosting Services.***

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

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

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

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

**Rest of Page Intentionally Left Blank**

**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 \_\_\_\_\_**

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)