

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

AGREEMENT FOR PROFESSIONAL SERVICES

WITH

RKG ASSOCIATES, INC.

THIS AGREEMENT is made and entered into as of the **1st day of May, 2022**, by and between the **MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY**, a public body corporate and politic ("**Authority**" or "**MSHDA**") and **RKG Associates, Inc.**, a foreign corporation authorized to conduct business in the state of Michigan ("**Contractor**") to Senior Housing Study to conduct a study of senior rental housing that discusses the current shortage of senior rental housing in Michigan, provides insights into the obstacles to increasing the supply, and provides ideas for how the shortage can be mitigated. (The Authority and the Contractor are collectively referred to as the "Parties").

WITNESSETH THAT:

The Authority and the Contractor do mutually agree as follows:

1. **Services Rendered/Scope of Work.** The Contractor shall, in a satisfactory and proper manner as determined by the Authority, render the services described in Exhibit A Scope of Work and Exhibit C Addendum, which are attached and made a part of this Agreement.
2. **Term.** TIME IS OF THE ESSENCE to this Agreement in connection with the delivery of the products or services or both ("Products and Services") described in the Scope of Work attached and incorporated into this Agreement as Exhibit A and the Addendum attached and incorporated as Exhibit C. The performance of Products and Services shall begin on or after the execution of this Agreement by the Authority and shall be completed no later than August 31, 2023. At its discretion, the Authority may extend this Agreement for up to 1 one-year period.

3. **Contract.** Price and Payment.

a. The total amount to be paid by the Authority to the Contractor under this Agreement shall not exceed **one hundred fifty-two thousand seven hundred sixty dollars and fifty cents (\$152,760.50)**. **The amounts to be paid for Products and Services is set forth in Exhibit B.**

b. Out-of-pocket travel expenses (such as lodging, meals, standard rate mileage) are to be reimbursed according to the State of Michigan travel rate schedule, and Authority policy, in effect when the expenses are incurred. State travel 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

c. Payment will be made upon presentation of invoices submitted periodically for work performed. Invoices and statement should be submitted to the Authority's Contract Administrator and, collectively, must include the following:

- i The Authority's contract number as shown above.
- ii Specific service performed and campaign name, if applicable.
- iii Amount paid to date on this Agreement itemized by monthly expenditures and total expenditures to date.
- iv Invoice number and total amount due.
- v Name of point of contact for services that were performed.
- vi Contractor staff member(s) and their hourly rate(s) who performed the services being invoiced (if applicable).
- vii Copies of signed receipts indicating that deliverable assets produced during the billing period, including but not limited to electronic, printed and other produced materials have been delivered to the Authority during the billing period.

Final payment shall be made upon the satisfactory completion and submission of all required work and documents.

c. WORK PERFORMED OR PROVIDED PRIOR TO THE TERMS OF THIS AGREEMENT SHALL NOT BE ELIGIBLE FOR PAYMENT UNDER THIS AGREEMENT.

4. **Permits and Licenses.** The Contractor shall be responsible for obtaining any and all permits, licenses, and other proper authorization or permission-related documents required for the performance of this Agreement.

5. **Insurance.** The Contractor shall maintain professional liability or self-insurance sufficient in the amount to provide coverage for any errors or omissions arising out of the performance of this Agreement. If, during the term of this Agreement, changed conditions should, in the judgment of the Authority, render inadequate the Contractor's current insurance or self-insurance limits, the Contractor will furnish to the Authority proof of additional insurance or self-insurance as may be required. All insurance or self-insurance required under this Agreement shall be acquired at the Contractor's expense, under valid and enforceable policies, issued by insurers of recognized responsibility. The Authority reserves the right to reject as unacceptable any insurer.

6. **Record Keeping.** The Contractor and the Authority shall maintain such personnel records as are deemed necessary by the Authority to assure a proper account for all engagement costs. These records will be made available for audit purposes to the Authority and the Auditor General of the State of Michigan, or any authorized representative, and will be retained for seven years after the expiration of the Agreement unless permission to destroy them is granted by both the Authority and the State of Michigan.

7. **Reports.** The Contractor shall promptly submit to the Authority's Contract Administrator (see Section 11) any monthly reports prescribed in Exhibit A, attached and incorporated into this Agreement.

8. **Nondiscrimination.** In accordance with the Elliott-Larsen Civil Rights Act, 1976 PA 453, MCL 37.2101, et seq., the Persons with Disabilities Civil Rights Act, 1976 PA 220, MCL 37.1101, et seq., and Executive Directive 2019-09, the Contractor and its subcontractors agree not to discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions, or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex (as defined in Executive Directive 2019-09), height, weight, marital status, partisan considerations, any mental or physical disability, or genetic information that is unrelated to the person's ability to perform the duties of a particular job or position. Breach of this covenant may be regarded as a material breach of this Agreement.

9. **Failure to Perform.** In the event the Contractor fails to perform Products and Services required under this Agreement or performs Products and Services in an improper manner, the Parties agree that the damage that the Authority will sustain as a result thereof will be substantial and difficult, if not impossible, to ascertain. Therefore, the Parties agree that in the event the Contractor either fails to completely perform Products and Services or performs Products and Services in an improper manner, the Authority shall be entitled to a credit against the Contractor's current unpaid billings for amounts previously paid to the Contractor after the Contractor's non-performance or improper performance. For the purposes of the foregoing, the Parties agree that the Authority shall have sole discretion in determining the adequacy of the Contractor's performance and the amount of credit to be taken. The damages for the Contractor's inadequate or improper performance, as provided in this Agreement, shall not be exclusive but shall be in addition to any other

damages which the Authority may be entitled to for the Contractor's default under this Agreement.

10. **Assigned Personnel.** The Contractor warrants that the personnel it will assign to perform the Products and Services under this Agreement shall possess the requisite education, competence and experience. The Contractor further acknowledges and agrees that such personnel may be subject to the evaluation and approval of the Authority, who shall retain the right to determine the sufficiency of the education, competence and experience of the personnel assigned to perform the Products and Services identified in Exhibits A and C attached and incorporated into this Agreement.
11. **Project Representatives.** The Contractor designates the following individual as project representative for all matters concerning this Agreement:

Eric Halvorsen
Vice President
76 Canal Street, Suite 401
Boston, MA 02114
Phone: 617-847-8912
Email: ehalvorsen@rkgassociates.com

The Authority designates the following individual as the **Contract Administrator** and is the only person authorized to process any modifications to the terms of this Contract, and any changes under this Contract:

Joe Kelly, CPPB
Authority Buyer
735 East Michigan Avenue
Lansing, MI 48912
Phone: 517-241-7121
Email: kellyj11@michigan.gov

The Authority designates the following individual as the **Project Representative(s)** and will monitor and coordinate the day-to-day activities of the Contract.

Cummings, Laurie
Market Specialist & Research Analyst
735 East Michigan Avenue
Lansing, MI 48912
Phone: 517-335-9922
Email: cummingsl@michigan.gov

The Contractor shall contact only the designated Contract Administrator or Project Representative with any Authority-related questions, work requests, etc., as described in this Agreement, as well as any Authority-related questions, work requests, etc., falling outside the scope of this Agreement.

Except for changes to the performance schedule (not including the project's completion date), the designated project representatives shall have no authority to make promises or binding obligations on behalf of the Authority, as such authority rests with the duly authorized persons executing this Agreement.

12. Employees of Contractor or Project Persons.

- a. Definition of Project Persons. “**Project Persons**” shall be defined in this Agreement as individuals performing the Products and Services pursuant to this Agreement, and/or signed this Agreement on behalf of the Contractor. Project Persons include the names of all employees, agents and independent contractors of the Contractor who perform or render Products and Services pursuant to this Agreement.
- b. Performance of Products and Services. The Contractor acknowledges that only Project Persons shall perform the Products and Services under this Agreement.

- c. Exhibit D - Project Personnel. If the Contractor (or Subcontractor) wishes to add an agent, employee, or independent contractor as Project Persons during the term of this Agreement, the Contractor shall complete and submit to the Authority an additional or revised Certificate Verifying Project Personnel of the Contractor / Subcontractor ("Certificate"), attached to this Agreement as Exhibit D, for that employee, agent, or independent contractor.
- d. 2007 PA 95, MCL 38.68c. The Contractor and its employees, agents, and independent contractors acknowledge 2007 PA 95, MCL 38.68c, as amended, requires retirees of the State Employees Retirement System (i.e., former state employees who have pensions with the State of Michigan) ("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 state pension for the duration of their reemployment. Effective October 2, 2010, "employed by the state" includes engagements of pensioned retirees as independent contractors.

Pensioned retirees who provide or render Products and Services under this Agreement as Project Persons must forfeit their pensions during the term of this Agreement if the pensioned retiree (a) is employed by the State, (b) is employed by the Contractor, (c) is a holder of an ownership interest in the Contractor, (d) is a subcontractor of the Contractor, or (e) is an employee of a subcontractor.

The Contractor acknowledges and agrees to secure the Authority's prior written consent before retaining, employing or subcontracting with a pensioned retiree to perform Products and Services under this Agreement. Retaining, employing or

subcontracting with a pensioned retiree to perform Products and Services under this Agreement without the Authority's prior written consent shall be (a) a material breach of this Agreement and (b) grounds for the Authority to terminate this Agreement and provide notice to the Office of Retirement Services that the retiree has received pension payments and payments directly or indirectly through this Agreement.

If the Contractor employs or retains a pensioned retiree as Project Persons or subcontracts with a pensioned retiree, the Contractor must submit a copy of the pensioned retiree's directions to the Office of Retirement Services ("ORS") to withhold the retiree's pension payments during the term of this Agreement. Find more information on the ORS website: <http://michigan.gov/ORS>.

The Contractor and the pensioned retirees it employs acknowledge and agree that neither the State, nor the Authority, nor its employees, directors, agents nor board shall be liable to the Contractor or pensioned retiree for the forfeiture of the retiree's pension payments during or after the term of this Agreement. The Contractor and pensioned retiree acknowledge that the Authority has no responsibility to confirm whether the ORS has or will forfeit the retiree's pension.

13. **Conflicts of Interest.** The Contractor acknowledges that its employees, members, shareholders, agents, or independent contractors, or subcontractors and their employees, members, shareholders and agents, prior to or during the term of this Agreement are not employees of the State of Michigan or its units. Prior to the execution of this Agreement, the Contractor acknowledges and confirms that it has delivered to the Authority a written

list of all interests of the Contractor, or its officers and employees, which may create conflicts between the interests of those entities or parties and the interests of the Authority. Should a constructive or actual conflict of interest arise during the term of this Agreement, the Contractor shall contact the Authority's Director of Legal Affairs immediately and describe in detail the conflict of interest.

14. **Prohibited Methods and Procedures.** The Contractor and its agents, subcontractors, employees, and representatives, in the course of the performance of Products and Services under this Agreement, shall not specify, recommend, use, or permit the use of any system, method, plan, design, process, procedure, patent, or copyright which, if used, infringes upon a proprietary interest or necessitates the payment of any royalty, fee, or commission. The Contractor shall not use or permit the solicitation for or securing of any agreement or employment in connection with this Agreement upon an agreement or arrangement for payment, either directly or indirectly, of a commission, percentage, brokerage, or contingent fee.

If Federal funds are used to pay the Contractor under this Agreement, no part of the money appropriated by any enactment of Congress shall, in the absence of express authorization by Congress, be used directly or indirectly to pay for any personal service, advertisement, telegram, telephone, letter, printed or written matter, or other device, intended or designed to influence in any manner a member of Congress, to favor or oppose, by vote or otherwise, any legislation or appropriation by Congress, whether before or after the introduction of any bill or resolution proposing such legislation or appropriation; but this shall not prevent officers or employees of the United States or of its departments or

agencies from communicating to members of Congress on the request of any member or to Congress, through the proper official channels, requests for legislation or appropriations which they deem necessary for the efficient conduct of the public business. 18 U.S.C. § 1913 (2002).

15. **Participation in Other Authority Programs.** With the exception of providing Products and Services to the Authority as described in Exhibit A and C of this Agreement, neither the Contractor nor the Contractor's employees, agents, officers, directors, shareholders, members or subcontractors will participate in Authority housing programs or do business with the Authority under any program in which the Authority has a direct or indirect relationship without securing approval from the Authority's Director of Legal Affairs.

16. **Indemnity and Non-Limitation. Mich. Const. art. IX, § 18.** The Contractor agrees to defend, indemnify and hold harmless the Authority from any claims, damages or expenses, including reasonable attorneys' fees, arising or alleged to arise in whole or in part from damage or injury caused by or resulting from any action or inaction of the Contractor, its agents or employees, or sustained in connection with the violation of any law, statute, ordinance or regulation by the Contractor, its agents or employees, or sustained in connection with the performance of this Agreement by the Contractor, its agents or employees, or sustained as a result of any breach of this Agreement by Contractor.

In any and all claims against the Authority or any of its officers, agents, or employees by an employee of the Contractor, any subcontractor, anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable, the indemnification obligation under this section shall not be limited in any way by any limitation in the amount

or type of damages, compensation, or benefits payable by or for the Contractor or by or for any subcontractor under worker's compensation acts, disability benefit acts, or other employee benefit acts..

17. Nonassignability and Delegation.

- a. The Contractor shall not assign or otherwise transfer any interest in this Agreement or in the project in any manner not provided for in this Agreement.
- b. The Contractor shall not delegate any duties or obligations under this Agreement to a subcontractor or independent contractor unless the Authority's Contract Administrator and Director of Legal Affairs has given written consent to the delegation. When submitting the request to subcontract, the Contractor shall include the following information about the subcontractor:
 - i. Name of Subcontracting Firm;
 - ii. Work that will be subcontracted;
 - iii. Names of individuals who will perform the subcontracted work;
 - iv. Subcontractors project representative and/or Project Person (See Section 12); and
 - v. List any and all Authority programs through which the subcontractor or the subcontractor's employees, officers, directors, members, shareholders or officeholders participate.
- c. In the event the Contractor retains a subcontractor in accordance with Section 17b above, the Contractor shall insert into each subcontract executed in connection with this Agreement appropriate and enforceable provisions requiring compliance with this Agreement by the subcontractor and the persons acting for it. Throughout the performance of any subcontracts, the Contractor shall monitor and verify the compliance of all subcontractors and persons acting for them and shall immediately take any affirmative or remedial measures prescribed by the Authority or otherwise deemed necessary in the opinion of the Contractor for enforcing compliance under such subcontracts.

d. **Delegation of duties or obligations under this Agreement to a subcontractor or independent contractor without the prior written consent of the Authority's Contract Administrator or Director of Legal Affairs shall be a material breach of this Agreement.** In the event a subcontractor is approved by the Authority's Contract Administrator and Director of Legal Affairs, the Project Persons for the subcontractor shall be subject to the requirements set forth in Section 12 (Employees of Contractor or Project Persons) of this Agreement, including, but not limited to, the restrictions on pension payments if a pensioned retiree is a Project Person of the subcontractor or an independent contractor retained by the Contractor.

Subcontracting work to be performed under this Agreement without the prior written consent of the Authority's Contract Administrator and Director of Legal Affairs shall be a material breach of this Agreement.

18. **Suspension and Debarment.** Pursuant to 1980 PA 278; MCL 423.322 *et seq.*, the Contractor, in performing this Agreement, shall not enter into a contract with a subcontractor, manufacturer, or supplier whose name has been listed in the register maintained by the State of Michigan, Department of Licensing and Regulatory Affairs, of employees who have been found in contempt of court by a federal court of appeals, on not less than three occasions involving different violations during the preceding seven years, for failing to correct an unfair labor practice as prohibited by Section 8 of Chapter 372 of the National Labor Relations Act, 29 U.S.C § 158.

The Authority may void this Agreement if the name of the Contractor or the name of a subcontractor, manufacturer, or supplier used by the Contractor in performing

this Agreement subsequently appears in the register during the period of this Agreement.

The Contractor certifies, by signing this Agreement, that it possesses business integrity and that neither it nor any of its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in grants or contracts by any federal, state, or local department or agency.

The suspension of the Contractor by the State of Michigan, an agency of the State, or a department of the Federal Government, shall be at the option of the Authority, a material breach and grounds for the immediate termination of this Agreement.

19. **Independence of Contractors.** The Authority shall retain the Contractor as an independent contractor, and the Contractor hereby accepts such independent contractor relationship, upon the terms and conditions set forth in this Agreement. Nothing in this Agreement shall be construed to create the relationship of employer and employee between the Authority and the Contractor or any of its employees or agents. **The Contractor, its employees and subcontractors, shall be deemed at all times and for all purposes to be independent contractors.** The Contractor acknowledges and agrees that all payments by the Authority to the Contractor shall be made without deduction for federal, state or local income taxes, social security taxes and similar items, and that the Contractor shall be solely responsible to report income under this Agreement to the Internal Revenue Service and other appropriate taxing authorities and to pay such taxes (including, without limitation, being solely responsible to make periodic estimated payments of such taxes in accordance with applicable law). The Contractor further

acknowledges and agrees that all payments under this Agreement to the Contractor by the Authority shall be reported to the Internal Revenue Service and other appropriate taxing authorities on Form 1099 (or equivalent or replacement forms). Finally, the Authority acknowledges that the manner and means of producing the Products and Services described in Exhibit A and C are under the control and at the discretion of the Contractor.

20. **Ownership of Documents, Reports and Other Products.** All documents, reports and any other products developed and/or delivered to the Authority under this Agreement shall become and be the property of the Authority.
21. **Disclosure of Information.** Other than as contemplated by this Agreement, the Contractor, its agents, and subcontractors, without the prior consent of the Authority shall not:
- a. disclose information or documents created or maintained in connection with this Agreement to anyone;
 - b. use information or documents created or maintained in connection with this Agreement to further any private interest.

Use or disclosure of documents or information without the prior written consent of an authorized officer of the Authority shall be a material breach of this Agreement.

22. **Modifications.** The Authority or the Contractor may request modification of the scope of work, products, budget, or project work schedule to be performed by the Contractor. Modifications shall comport with the intent and purpose of this Agreement and shall be consistent with applicable state and federal regulations, limitations, guidelines, policies, and interpretations prescribed by the Authority pursuant to law. All requests for modification shall be submitted in written form by the duly authorized representative, as specified in

Section 11, of the party requesting modification prior to modification implementation. Failure to obtain prior approval will result in the disallowance of expenditures.

No verbal representation, understanding, agreement, or interpretation of any officer, agent, employee of the Authority or Contractor, either before or after execution of this Agreement, shall modify any of the terms of this Agreement, unless such representation, understanding, agreement, or interpretation is expressly stated in this Agreement or an amendment to this Agreement executed by both parties.

23. **Termination of Agreement.** Termination is the cancellation of this Agreement, in whole or in part, at any time prior to the date of completion.

a. Termination for cause. The Authority may terminate this Agreement, in whole or in part, at any time before the date of completion, whenever it is determined that the Contractor has failed to comply with the terms and conditions of this Agreement. The Authority will promptly notify the Contractor in writing of the termination and the reasons for the termination, together with the effective date. Payments made to the Contractor or recoveries by the Authority under this Agreement when it is terminated for cause will be in accordance with the legal rights and liabilities of the parties.

b. Termination for convenience. The Authority or the Contractor may terminate this Agreement in whole or in part when the Parties agree that the continuation of the project would not produce beneficial results commensurate with the further expenditure of funds. The Parties will agree upon the termination conditions, including the effective date, and in the case of partial terminations, the portion to be terminated. An amendment of the terms of this Agreement is required for all terminations for convenience.

c. Termination by Contractor. At any time prior to the first payment on the Agreement, the Contractor may, with written notification to the Authority, unilaterally cancel this Agreement. Once initiated, no Product or Services financed with Authority assistance shall be terminated by the Contractor prior to satisfactory completion without approval of the Authority. After the first payment, the Product or Services may be terminated, modified, or amended by the Contractor only by mutual agreement of the Parties. Termination requests prior to completion of the Product or Services must fully explain the reasons for the action and detail the proposed disposition of the uncompleted Product or Services.

d. Termination of Agreement for Unavailability of Authority or Federal Funds.

It is the intent and understanding of the Parties that this Agreement is contingent upon the availability of Authority or Federal funds or the receipt by the Authority of Federal funds. If Authority funds or Federal funds approved or obligated by the Authority in connection with this Agreement are at any time rendered unavailable, the Authority shall then have the right to terminate this Agreement by the giving of a written notice, the basis, and the effective date of the termination to the Contractor. Should this Agreement be terminated by reason of the unavailability of Authority or Federal funds for the purposes of this Agreement, all finished or unfinished documents, data, studies, reports, and other materials prepared by the Contractor under this Agreement prior to the effective date of the termination shall be delivered in a format specified by the Authority.

In the event of termination under this section for lack of Authority or Federal funds, the Contractor shall be entitled to receive payment for Products and Services incurred under this Agreement prior to the effective date of termination.

- e. Commitments. If this Agreement is terminated, the Contractor will not incur new obligations for the terminated portion after the effective termination date. The Contractor will at its own expense cancel any outstanding obligations. Costs incurred after the effective date of the termination will be disallowed. In the event of termination, all finished or unfinished documents, data, studies, reports, and other materials prepared by the Contractor under this Agreement prior to the effective date of termination shall become the property of the Authority. The Contractor will provide all finished and unfinished material as previously described within 30 days of terminating. However, the Contractor will be entitled to retain copies. The Contractor, in the event of termination under this provision, is entitled to receive reimbursement for Products and Services satisfactorily performed under this Agreement prior to the effective date of such termination. Notwithstanding the foregoing, the Contractor shall not be relieved of its liability to the Authority for the damages sustained by the Authority as the result of any breach of this Agreement until the Authority so releases the Contractor and has determined for the purpose of set-off the exact amount of damages due the Authority.
24. **Survival.** Any right, obligation or condition that, by its express terms or nature and context is intended to survive, will survive the termination or expiration of this Agreement; such rights, obligations, or conditions include, but are not limited to, those related to insurance; indemnification and non-limitation of liability; disclosure of information; ownership of documents, reports and other products; and prohibited methods and disclosure.
25. **Severability of Provisions.** It is declared to be the intent of the parties that if any provision of this Agreement executed by both parties or its application to any persons or circumstances is adjudged by any court of competent jurisdiction to be invalid, the court's judgment shall not affect or invalidate the remainder of this Agreement nor its application to


other persons or circumstances, unless so provided by the court or unless the severance of the invalid provision alters the basic intent or purpose of this Agreement, would cause an increase of the Authority's financial obligation, or renders impossible the compliance with any applicable statute, regulation, limitation, guideline, policy.

26. **Michigan Law.** This Agreement shall be governed by the laws of the State of Michigan and shall be binding upon the Contractor's successors, assigns, and legal representatives. All records pertinent to this Agreement are subject to public disclosure under the Michigan Freedom of Information Act; 1976 PA 442; MCL 15.231 *et seq.* The Contractor shall insert the provisions of this section into any subcontract entered into to accomplish the terms of this Agreement.

27. **Counterparts.** This Agreement may be executed in several counterparts which together shall be deemed to constitute an original agreement.

IN WITNESS WHEREOF the Authority and the Contractor have executed this Agreement as of the date first above written.

RKG ASSOCIATES, INC.

By: 

Eric Halvorsen
Vice President & Principal

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

By: 

Gary Heidel
Acting Executive Director

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

EXHIBIT A

Scope of Work

I. Overview

There is currently a shortage of affordable senior rental housing in Michigan. This shortage, which includes both housing with senior services and independent living apartments, will surely worsen as the baby boomers continue to age. The Contractor is to conduct a study of senior rental housing that discusses the current shortage of senior rental housing in Michigan, provides insights into the obstacles to increasing the supply, and provides ideas for how the shortage can be mitigated.

The Contractor may work with an Advisory Committee comprised of experts in relevant fields and to participate in quarterly Committee meetings. Also, MSHDA may ask the Contractor to conduct various presentations of the final report, possibly including one to the Authority's Board and one at MSHDA's annual housing conference. The final product should consist of a report that provides the information indicated in the Scope of Work in a way that can be understood by stakeholders from the housing industry, the aging community, social services agencies, policymakers, the public, and other interested parties. The final report is to be delivered both as a PDF file and in hard copy consisting of 10 bound copies. An electronic copy of any public presentation materials is to be provided as well.

MSHDA's Office of Market Research (OMR) has conducted recent data analysis demonstrating that a senior rental housing shortage exists in Michigan. This research focuses primarily on the current demand, supply, and affordability of senior housing in the state. Please note that in order to avoid duplicating this previous work, the study should draw (when feasible) on the data/analysis already available, while providing additional research and analysis as necessary. The Authority's Statewide Housing Needs Assessment and the Michigan Homeownership Study is located at www.Michigan.gov/HousingResearch. While not required, surveys, interviews, and/or focus groups may be helpful for collecting some of the requested information.

II. Objectives, Tasks & Activities

- A. General Objectives.** To successfully perform the services described in Section I above, the Contractor must meet the general objectives below. MSHDA is also asking for an additional piece of research to be submitted separately from the main body of the report (in an addendum or a separate document) which addresses some specific questions related to the reviews of senior housing Market Studies submitted to the Authority as part of Low-Income Housing Tax-Credit applications.

The research should address the need for a broad spectrum of senior rental housing, including independent living apartments, rental housing with services, housing developments offering multiple levels of care, and other important current or potential rental types. (“Senior services” as used in herein includes things like meals, housekeeping and laundry services, medication management, and help with activities of daily living.) The Authority is not seeking information about nursing homes or other medical facilities, unless it is germane to senior rental housing. Please also note that, while the focus of this research is the need for rental housing, homeownership may be addressed in the study where it impacts the demand for rentals.

The research should focus on senior housing that is affordable to low-and middle-income households. However, to the extent that market-rate housing impacts or explains the markets for affordable options, please include it. (Please note that the Authority often funds housing with a combination of affordable and market-rate units.) The Authority is further interested in an examination of seniors’ housing needs by age group, as younger seniors tend to have different housing, accommodation, and service needs than older seniors. One suggested option is to use the following categories: Near Seniors (aged 55-64), Young Seniors (65-74), Middle Seniors (75-84), Oldest Seniors (85+ years). Finally, when we refer to “safe” or “appropriate” housing, it means housing which has the layouts, amenities, accessibility, safety features (grab bars, etc.), and other characteristics to allow seniors to age in place in their homes safely and comfortably.

B. Descriptive Data. The report’s readers should have enough background on the state’s current situation to understand the context in which the shortage of safe, appropriate, and affordable senior housing occurs. Therefore, this section should describe current and projected trends in Michigan’s senior housing markets and document the extent of unmet rental housing demand. Much of the demographic, economic, and housing data can be found in MSHDA’s existing research, as previously discussed. In addition to statewide data, please provide breakdowns for urban, suburban, and rural areas for those statistics for which this geographic breakdown is feasible.

- 1. Demographics.** Major trends and conditions in the numbers of Michigan’s senior households, such as current/future household distribution by age group, seniors as a percentage of the state’s population and households, tenure (renting v. homeownership) and other major factors. Significant patterns pertaining to Michigan seniors by racial group, gender, and other underserved groups consistent with MSHDA’s Guiding Principles. (See https://www.michigan.gov/mshda/0,4641,7-141-7559_46718---,00.html). Provide five and ten-year projections of major demographic trends that might impact the need for or availability of affordable senior rentals in the future.
- 2. Economic factors.** Major trends and conditions in income levels, income sources (pensions, Social Security, 401k, etc.), and household costs of Michigan seniors. Provide the composition of a typical senior budget (the amount/percentage of income typically spent on housing, food, health care, leisure, etc.), and how it varies by the age category of the senior. Provide information about the employment status of seniors by age category. Discuss the major economic trends that might impact housing availability/affordability into the future. How do the factors differ for underserved populations?

3. Housing data. Present data/information that can paint a picture of the overall current housing situation for Michigan seniors, including the tenure (the distribution of renters and owners) and tenure changes (owners moving to rentals, etc.). Please discuss how housing situations vary by seniors' racial group, gender, disability category, and other relevant category of underserved population. At a minimum, please provide the following of information to the extent that data is available:

- a. **Renters.** Gross rent as a percentage of income, movership rates, availability of services, housing characteristics, percentages living in age-restricted and non-age restricted rentals.
- b. **Homeowners.** Housing costs as a percentage of income for mortgaged and non-mortgaged households, movership rates, and average value of owner-occupied homes, and basic housing characteristics.
- c. **Unmet Need.** An estimate of unmet need for affordable senior housing of all types now and projected 5 and 10 years into the future. Break unmet need down by age category. MSHDA is looking for a general idea of the amount unmet need; rough estimates of need levels or ranges of need will be sufficient. MSHDA's previous research may be of help with this section.
- d. **Rural Households.** The major demographic, economic, and housing indicators above, plus any others that the research firm deems important. Compare major indicators for rural households to those of urban and suburban households.

C. Understanding Senior Rental Housing in Michigan. To better meet the need for safe and affordable senior housing, the Authority is interested in learning more about the current housing options available to seniors. In this section, MSHDA is looking for an understanding of what housing types are currently offered, including such things as target markets, pricing structures, amenities, and building designs.

There are no commonly agreed upon definitions of senior rental housing categories in Michigan; therefore, Contractor should define each type. Contractor should use the following categories, which MSHDA has used in the past: "independent living" offering no meals or senior services, "MSHDA Congregate Care" as defined below, "assisted living" offering meals, services and help with activities of daily living, and continuing care retirement communities ("CCRCs") offering multiple levels of care on one campus. MSHDA also funds a model of senior housing called "Congregate Care." These properties are age-restricted to households ages 55+ and offer a-la-carte 1 or more meals per day plus housekeeping services. These properties also offer transportation included in the rent. Residents pay a higher monthly rent, exclusive of a-la-carte services, than would be paid for a comparable rental that did not offer any optional services. Other categories may be added if it is useful.

For each category of rental housing in the report, please address the items below, noting any instances where data is not available. It may be helpful to contact a sample of different types of properties to gather some of the requested information.

1. Rental Housing Features, Cost, and Availability.

- a. Describe each category of senior housing and discuss the typical target market or tenant profile that it might attract (younger, active seniors, or older seniors in need of daily assistance, for example, and income levels.) What is known about the average age of a resident in different categories of rental housing?
- b. If data is available, approximate the number of properties and units for each type and discuss their geographic distribution in the state (urban, suburban, rural).
- c. What are the typical price ranges for rent, services, meals, and any other major costs for the different product types?
- d. Discuss the affordability of senior rental housing to low-income and middle-income households, including differences in affordability by rental type. Address any social inequities in the availability of senior rental housing by racial group, gender, disability category, or other relevant category of underserved population.
- e. Discuss and quantify (if possible) the degree to which the supply of each rental type is sufficient to meet the future need. What types are in the greatest need now? In the next 5 years? 10 years? Specifically address the upcoming need for affordable housing with services, in light of the aging of the Baby Boom generation.
- f. Discuss the prevalence of senior housing with services in low-income areas.
- g. Many senior renters live in apartments that are not age-restricted to older households. What does existing research tell us about the numbers of seniors living in non-senior rentals? What is known about whether their needs for services are being met? If so, how?
- h. Looking at existing MSHDA housing, what is the breakdown between senior and non-senior housing? What percentage of affordable housing units for which MSHDA has granted a loan or tax credit allocation in the past five years has been for age-restricted housing? How has the mix of MSHDA senior vs. family (non-age-restricted) housing changed over time? (MSHDA can provide the raw data necessary for this item.)
- i. If there are other issues identified by the Contractor that could add to our understanding of this topic, please discuss them.

D. Seniors Seeking Rental Housing. Many seniors, both homeowners and renters, reach a point where they need or want to move from their current homes to senior rental housing. They may do this for a variety of reasons, such as need for services, seeking safety/security after the loss of a spouse, the desire for increased sociability, or the need to live closer to their adult children. MSHDA would like to get a better understanding of the challenges faced by seniors seeking senior living. We are interested the following questions and any others that Contractor may feel are instructive:

- What are the most common reasons for such relocations?

- What challenges do seniors face when seeking affordable rental housing? How are these challenges different for homeowners and renters?
- What are seniors looking for when making such housing decisions; what types of locations, services, and characteristics do they most need and want?
- What role do family members typically play in such relocation decisions?
- For homeowners, discuss the role that the proceeds of a home sale may play in the ability to afford senior rental housing. Discuss the challenges seniors might face in selling their homes when they plan to relocate to a rental setting. How could significant deferred maintenance on a home impact the owner's ability to afford a rental when depending on home-sale proceeds to pay rental costs?
- Discuss the unique challenges that underserved households face when seeking affordable rental housing.
- If there are other issues identified by the Contractor that could add to our understanding of this topic, please discuss them.

E. Rural Senior Housing. The Authority would like a better understand of the unique senior rental housing challenges in rural communities. Address the following:

- i. Describe the current housing situation of seniors in rural Michigan (tenure, housing cost burden, etc.). How does the housing cost burden differ for homeowners and renters? By age group?
- ii. What are the most important demographic, economic, and housing trends related to rural rental housing serving seniors? For those already living in rental properties, are they in age-restricted rentals vs. open-occupancy rentals?
- iii. To what extent are the care needs of rural seniors being met?
- iv. How common are rural assisted living facilities? Independent living apartments? What major trends are seen in the different types of senior housing in rural areas? Include, if available, data on the cost and availability of the different types of senior rental housing in rural areas.
- v. Estimate the unmet need for affordable age-restricted rental housing among seniors in rural areas, compare it to that of urban and suburban areas, and discuss the likely reasons for any differences.
- vi. Discuss how the small community size that inhibits economies of scale may impact the development of rural senior housing. Also address whether physical isolation from amenities and services (such as social services and health care) impacts the provision of service-assisted housing.
- vii. Address any social inequities in the availability of rural senior rental housing by racial group, gender, disability category, or other relevant category of underserved population.
- viii. If there are other issues identified by the Contractor that could add to our understanding of this topic, please discuss them.

F. Impediments. The Authority is looking for an examination of the reasons behind the shortage of senior housing. The study should identify and explain key impediments to addressing senior housing needs and explore affordable housing policies, practices, and structural/systemwide factors that present obstacles. At a minimum, please address the specific issues below.

1. **Senior Rental Housing.** Describe how issues related to rental markets (demand, supply, demographics, economic factors) might be problematic. Please include at least the following:
 - a. **Cost of Building and Operating Housing.** The role of cost factors (such as building costs of land, labor, and materials, and operating costs such as labor costs and management issues or other factors) in providing affordable senior housing.
 - b. **Services.** The costs, challenges, and risks related to the provision of senior services: service delivery challenges, labor issues, financing issues (particularly given that not all lenders will underwrite the cost of providing senior services), liability risks, others.
 - c. **Senior Rentals and Tax Credits.** This discussion should address the obstacles that developers may face when attempting to develop affordable senior housing with Low-Income Housing Tax Credits. Please address the issues related to senior housing both with and without services. At a minimum, please address the following:
 - i. The degree of local government support for affordable rental housing, including the willingness to grant tax abatement via Payments in Lieu of Taxes (PILOTs).
 - ii. Discuss issues pertaining to unequal access to affordable senior housing by persons of different by racial groups, gender, disability categories, or other relevant category of underserved population. Discuss the degree to which so-called “NIMBYism” plays a role in local support for affordable senior housing.
 - iii. What local zoning and other regulatory barriers exist?
 - iv. What are the major obstacles that developers face when they seek to develop affordable senior properties with MSHDA funding? Address any impediments posed by the Authority’s Qualified Allocation Plan (QAP), including the LIHTC point scoring or set asides, or other MSHDA policies and procedures.

- v. What are the major obstacles that developers might face when they seek to develop affordable assisted living properties in Michigan under MSHDA's existing Affordable Assisted Living program?
- vi. What types of impediments do seniors face when trying to find and pay for a senior rental? How might this experience differ for underserved populations? How do these impediments differ for younger seniors compared to older seniors?
- vii. If there are other issues identified by the Contractor that could add to our understanding of this topic, please discuss them.

2. Systemic Obstacles. Discuss systemic, societal, cultural, economic, and other macro forces that may help explain the lack of sufficient affordable senior housing. Address the degree of willingness to prioritize public resources for senior housing and housing with services. Discuss the possible costs to individuals, families, health care systems, social services systems, and other facets of society of not providing adequate safe and affordable senior housing. If there are other issues identified by the Contractor that could add to our understanding of this topic, please discuss them.

3. Other Obstacles. Identify any other significant barriers to increasing the availability of affordable senior rental housing in Michigan.

G. Action Steps. This section should provide the Authority with a toolbox of potential action steps which could be taken to lessen unmet senior housing demand. As a reminder, MSHDA is not asking the Contractor to recommend specific actions for the Authority to take, but simply provide a range of options to consider.

As part of this effort, the Contractor should examine unique or successful efforts made by affordable housing organizations across the nation. Specifically discuss any noteworthy tools used by other state Housing Finance Agencies to facilitate the development of senior housing, such as QAP scoring incentives, changes to program parameters, create uses of funding, or others. For any policies, programs, or procedures that the research firm feels might be beneficial in Michigan, discuss the benefits and obstacles related to implementing the action, and provide a general description of the processes and resources required to implement it. Also, please address the specific questions below.

- 1. How can MSHDA help to increase the supply of different types of affordable rental housing (independent living, congregate, assisted living, others, etc.)?
- 2. Are there any pots of funds that MSHDA has overlooked which could augment its rental programs to help increase the supply of senior housing?
- 3. How could MSHDA better incentivize senior rental housing development through the QAP and other program parameters?

4. How can MSHDA improve the equitable distribution of affordable senior housing among households regardless of race, gender, or other category of underserved population? How can MSHDA ensure that low-income areas are better served?
5. Are there any notable new rental housing models for seniors emerging in the affordable arena?
6. How can MSHDA modify its existing Affordable Assisted Living program to increase the supply of affordable assisted living facilities in Michigan? How can Medicaid waivers best be used to facilitate this type of development? Are there any sources of funding that have been overlooked? Please explore one or two existing programs used by other housing agencies in the Great Lakes region that have successfully paired Medicaid waivers with assisted living. What can MSHDA learn from their experience?
7. What strategies might MSHDA consider in order to increase the supply of affordable rentals in rural areas? If the Contractor deems it is useful, provide examples/case studies of ways that the obstacles providing senior housing with services in rural areas have been overcome.

H. Tasks

Task 1- Project Start Up and Engagement

Contractor will review relevant materials, planning documents, databases, maps, and any other information relevant to the project. A thorough review of such information will establish a research context from which to begin the project. This information will also provide the Contractor with a background perspective on Michigan's present senior housing market and demographic trends. At a minimum, the review materials will include the following documents:

- Current housing policies, procedures, and program documentation;
- Any relevant prior studies (i.e. – homeowners study, senior housing study, local market studies for senior housing, etc.);
- List of contacts for senior housing/senior resident organizations, senior housing developers, etc.; and
- Relevant demographic and housing data.

Client Engagement

Throughout the course of this engagement, Contractor will work closely and in concert with the Authority to ensure the project moves forward seamlessly and remains focused on answering the key questions at hand. A hybrid approach of virtual meetings and in-person engagements, which may change based on any COVID-19 protocols issued by

the State of Michigan or Contractor to ensure the health and safety issues are addressed. In-person meetings may be limited to presentations to the Advisory Committee, MSHDA Board, and/or MSHDA's Annual Housing Conference. Many meetings can be held virtually, reserving in-person meetings for the presentation of key data points and action steps. When possible, combine trips for in-person meetings with planned focus group discussions to minimize travel expenses.

Task 1.1 - Kickoff Meeting

An initial kickoff meeting will be held virtually with the Authority to review and discuss key elements of the project. The kickoff meeting is an important opportunity for the Contractor to better understand the relevant issues surrounding the project, for the Authority and the Contractor to come to common agreement regarding the project's objectives, and to fully understand expectations for the final product. Logical points for discussion at the kickoff meeting include:

- What are the primary objectives for this effort?
- How do current policies and programs meet (or not meet) the needs of the residents of the State?
- Are there any groups currently not being served?
- What are the short-term and long-term goals for providing senior housing in the future?
- What partnerships and initiatives are currently in place to create more senior housing opportunities at all levels of affordability?

This will also provide a time to discuss the project's meeting schedule and engagement plan.

Task 1.2 - Client Meeting Plan

Based on the kickoff meeting, Contractor will schedule up to three in-person meetings with the Authority staff throughout the course of the project. These meetings are envisioned to occur at key milestones in the project and function as check-in meetings in which RKG presents study findings. These meetings could include an initial presentation of demographic and housing data, a presentation on the property manager and resident preference surveys and focus groups, and a final presentation of action steps and the report.

Task 2 – Descriptive Data

Task 2.1 – Demographics

Contractor to conduct the data analysis described in Task 2 at three different geographic levels as requested by MSHDA: Urban, Suburban, and Rural. To complete this analysis,

Contractor will collect and aggregate publicly available data from the US Census at the county subdivision level for the entire state. Data points will be aggregated and summarized to present the differences between each of the three geographies and help inform the different issues and opportunities facing senior households today and into the future. Contractor will work with Authority staff to refine the methodology for defining these three market types prior to any data collection efforts.

The demographic data will provide a deep dive into the location, numbers, and sociodemographic composition of Michigan's senior households by market type. This analysis will also include, where possible, information on race/ethnicity, gender, and any indicators of under-served populations as well. Contractor will break down the data by different age cohorts specific to senior households such as 55-64, 65-74, 75-84, and 85+.

To understand how the senior population in Michigan may change over the next five to ten years, Contractor will analyze population projections at the county-level using population by age projection data from Emsi. This information can be used to understand macro level changes in the number of senior residents in each county and can be aggregated to different geographies such as prosperity regions (consistency with homeownership study) and changes at the state level.

Task 2.2 – Economic Factors

Contractor will compile and analyze data related to the various income sources of senior households and how those income sources factor into housing affordability. It will be important in this section to identify the real incomes of senior households in urban, suburban, and rural locations and compare those incomes to the numbers of residential units affordable to households at each income cohort. Contractor will use HUD area median income definitions for the State of Michigan to understand total housing supply availability compared to the number of households at each AMI level. Contractor will then compare household incomes for seniors to the availability of units at each price point, for both rental and ownership units.

Task 2.3 – Housing Data

After a thorough review of the demographic and economic factors for senior households, Contractor will summarize key data points and trends for the actual housing stock itself. This will include how housing tenure (rent vs. own) differs for senior households and how preferences may be shifting, how are housing prices changes (rent and mortgages) for seniors, and are more senior households moving to a different housing type or moving to a different location than before. Contractor will also look at how population by age is projected to change over the next 5-10 years and discuss the housing preferences and ability to pay of these senior households. This component of the project should also be informed by the surveys and focus groups conducted in Task 3 so we understand if

housing preferences are also shaped by the age of the householder. Task 2.3 may be completed later in the process so it can be informed by the findings in Task 3.

Task 2.4 – Rural Area Data Analysis

Since Contractor's approach is to set up the data collection and analysis by urban, suburban, and rural areas, all data collected and analyzed for rural areas in Tasks 2.1-2.3 will already be available and can be pulled out into its own section in the report. Contractor can make this a separate section and identify any trends in rural areas that are different than the urban and suburban counterparts across the state.

Task 3 – Senior Rental Housing in Michigan

To understand the senior rental housing market in Michigan, the first step is to define the different types of housing options available to seniors. Working from the 2012 Senior Housing Market Study, Contractor will add any additional senior housing models that may be more prominent today than ten years ago. This may include models like accessory dwelling units, senior co-ops, and naturally-occurring retirement communities (NORCs). Once fully defined, Contractor will identify a subset of these senior housing developments in urban, suburban, and rural locations across the state to conduct outreach and surveys with active property managers. The purpose of the surveys of property managers will be to understand and attempt to answer all the questions around rental housing features, costs, amenities, location, target market, and affordability thresholds.

Contractor will work with Authority staff and the Areas Agencies on Aging to identify senior housing developments across the state to conduct outreach to for completion of the surveys. Contractor will conduct the survey using online tools, but could follow up with paper copies if response rates are low. All digital and paper responses will be entered into a database for analysis and identifying data conclusions.

Task 4 – Seniors Seeking Rental Housing

Contractor will conduct a wide reaching survey to understand the housing preferences, mobility, opportunities, and challenges senior household face when making housing choices. An on-line survey tool like Survey Monkey would allow for a wide range of respondents across the state and hopefully capture senior households from urban, suburban, and rural market areas. Contractor will use on-line tools to limit in-person survey engagements where possible.

Contractor, through the assistance of Authority staff, would like to engage with the Michigan Area Agencies on Aging to understand how best to reach the senior community and also understand their access to computers or internet ready devices for

survey purposes. We would hope to conduct outreach via emails or mailings to Councils on Aging in Michigan at the local level to help us reach seniors who could respond to our survey.

If on-line responses are lacking from certain areas of Michigan or certain age groups of seniors, Contractor will work with Authority staff to send paper surveys to Councils on Aging in targeted locations. Contractor can hand enter survey results into their database to ensure accurate recording of all survey results.

To build upon the survey results, Contractor to conduct in-person focus groups with seniors in urban, suburban, and rural parts of the state and include different types of senior residential housing. These focus groups of no more than 20 seniors at each location would provide additional information and data points on senior housing preferences, issues, and opportunities. This focus group component could be completed over the course of a week traveling to different parts of the state each day and conducting focus groups with senior participants.

Task 5 – Rural Senior Housing

The research, analysis, and synthesis will culminate in a final report. The report will present a detailed analysis of the housing conditions across the state and regions under examination, as well as a clear set of strategies which can be used by policy makers to achieve housing goals.

Contractor will present the findings of the study to the Authority and make any revisions based on client feedback.

Task 6 – Impediments

Impediments to housing production, affordability, and general access to housing for seniors can take many different forms. There are financial impediments, regulatory impediments, market impediments, etc. The difficulty with impediments to residential development is quantifying them in some cases. Contractor will utilize a combination of macro level research on impediments, quantitative analysis of data in early tasks, and interview with senior housing developers to identify each impediment and document the barriers each creates to successful implementation of senior housing production. These impediments will be used, in part, to inform the action steps put forward in Task 7.

Task 7 – Action Steps

Through the analysis of the senior housing market and an identification of potential impediments to creating affordable senior housing options, Contractor will develop a

series of action steps which will be presented as a set of options or tools for the Authority and its partners to consider. These will not be presented as actions the Authority must do, but instead offer different ideas and alternatives for the agency's consideration. The tools we may consider will be informed not only by the research conducted in this process, but also national research and best practices in senior housing across the country. Where case studies are applicable, Contractor will highlight such options and describe how they were implemented and what made them successful. RKG will also describe how different policy, regulatory, and financial tools could be applied here in Michigan and the potential benefits and drawbacks of each tool or approach.

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MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

EXHIBIT B

PRICING

Tasks	Hours			Total Labor Cost
	Principal (\$205)	Senior Analyst (\$175)	Analyst (\$150)	
Task 1	35	19	18	\$13,200
Task 2	16	32	104	\$24,480
Task 3	20	48	144	\$34,100
Task 4	20	48	144	\$34,100
Task 5	4	8	24	\$5,820
Task 6	8	40	8	\$9,840
Task 7	16	40	8	\$11,480
Report	8	24	24	\$9,440
Exhibit C	4	8	24	\$5,820
TOTAL LABOR COSTS				\$148,280

Lodging Costs (State Per Diem)			
Description	Daily Rate	Number of Nights	Total
Lodging - Project Manager	\$85	8	\$680
Lodging - Analyst	\$85	7	\$595
Meal Costs (State Per Diem)			
Description	Daily Rate	Days	Total
Meals - Project Manager	\$44.75	10	\$447.50
Meals - Analyst	\$44.75	8	\$358
Transportation Costs			
Description	Cost Per	Number	Total
Flight -Project Manager	\$200	4	\$800
Flight -Analyst	\$200	3	\$600
Car rental	\$100	10	\$1,000
TOTAL INDIRECT COSTS			\$4,480.50

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

EXHIBIT C

ADDENDUM: MARKET STUDY ANALYSIS QUESTIONS

The MSHDA Office of Market Research staff reviews hundreds of site-specific market studies annually as part of the Low-Income Housing Tax Credit Program and MSHDA's Direct Lending program. To help conduct reviews of senior housing market feasibility, MSHDA is requesting asking that the following optional information be provided in a separate document.

1. Paying 30% of one's income toward housing is generally considered to be "affordable". But some feel that this percentage should be higher for seniors, since their non-housing costs are assumed to be lower than younger households. Is this true? What percentage of income should seniors reasonably pay towards housing in order to have enough left over for other expenses if they 1) live in an assisted living setting and must pay for meals and services, 2) need Congregate Care services (under MSHDA's Congregate Care model) or 3) live in an independent living setting without meals or services?
2. What does existing research show about the extent to which family members subsidize their elderly parents' incomes? Do other Housing Finance Authorities take this additional income source into consideration in their market assessments?
3. What are the average costs of supportive services and meals charged to residents in Michigan assisted living facilities? What does a typical meal cost? Housekeeping and laundry services? Medication management? Other? If significant cost differences by geographic region can be identified, please provide this information.
4. Given that pricing in assisted living facilities is often based on different bundles of services, what models exist for comparing the total price (rent plus services plus meals) paid by residents when comparing different service-assisted rentals?
5. Discuss current trends in the preferences of seniors seeking multifamily rentals as they impact market preferences for unit sizes, amenity types, and other features. What product types, amenities, and features are growing or waning in popularity?
6. What changes could we make to our market study guidelines or other program parameters that might lead to an increase in the supply of affordable senior housing without sacrificing housing quality or long-term financial feasibility?

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

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 Eric Halvorsen
(Print or type name above line)

Title with Contractor/Subcontractor Vice President & Principal

Name Kyle Talente

Vice President & Principal
(Print or type name above line)

Title with Contractor/Subcontractor _____

Name Erik Woyciesjies
(Print or type name above line)

Market Analyst/Planner
Title with Contractor/Subcontractor _____

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

(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 X

(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 X

Name of Signatory for Contractor/Subcontractor:

Printed Name: Eric Halvorsen
(Print or type name above line)

Its: Vice President & Principal

Signature: 

Federal Identification Number: 02-0357052

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