



REQUEST FOR PROPOSALS

DATE OF ISSUE: July 15, 2024

TO: Potential Providers of Services

RE: Request for Proposals (“RFP”) for Consulting Services related to the completion of an Analysis of Impediments to Fair Housing Choice (“AI”)

Quick Reference

	Date	Time
Posting of the RFP	July 15, 2024	
Deadline to submit questions about this RFP:	August 7, 2024	4:00 PM Eastern (Detroit, MI)
RFP Virtual Open House Meeting Link	July 30, 2024	10:30 AM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	August 19, 2024	
Proposal deadline:	August 28, 2024	4:00 PM Eastern (Detroit, MI)
Notification to winning bidder	Sept 16, 2024	
Anticipated contract begin date:	October 2, 2024	
AI Draft Due	April 1, 2025	
AI Final Draft Due	June 2, 2025	

***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 ("MSHDA") is seeking an organization authorized to do business in Michigan to perform Consulting services for the completion of an AI to Fair Housing Choice.

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

The completed AI will cover a period of five (5) years, during which services will be required in responding to questions and concerns.

The selected entity may partner with another organization that specializes in the analysis of discriminatory policies and practices that have negatively impacted marginalized populations. In particular, we seek data on practices that still may be identified as impediments. Efforts by other entities that have undertaken similar efforts can be used, such as by the Michigan State Historic Preservation Office and the Michigan Association of Planning.

II. Contents of this RFP

1. Overview of services sought, tasks and activities ("Scope of Work")
2. Exhibit A – Notices to Bidders
3. Exhibit B – Submission & Selection
4. Exhibit C – Proposal Format
5. Exhibit D – Project Personnel Form

1. Overview (Scope of Work)

As a condition of receiving Community Development Block Grant ("CDBG") and other HUD formula-based funding, the state must submit a Consolidated Plan that analyzes housing market conditions, assesses the housing needs of its lower income families and other groups within the eligible population, describes a strategy for addressing the identified needs, and articulates an action plan for investing federal affordable housing dollars. The Consolidated Plan requires states and entitlement communities to undertake Fair Housing Planning (FHP) which mandates certification by MSHDA that it affirmatively furthers Fair Housing in accordance with [24 C.F.R. 91.325](#) and attests to MSHDA participating in the items mentioned below. The Consolidated Plan also requires citizen participation in its analysis of housing conditions. Therefore, states and entitlement communities are asked to seek the input and cooperation of other state and local governmental agencies, and community and business organizations.

- **Affirmatively Furthering Fair Housing.** (AFFH) Each state is required to submit a certification that it will affirmatively further fair housing, which means that it will conduct an analysis to identify impediments to fair housing choice within the state, take appropriate actions to overcome the effects of any impediments identified through that analysis, and maintain records reflecting the analysis and actions in this regard. Significant revisions to, and analysis of, the 2016 Report and Outcomes and the creation of a new five-year plan for AFFH is necessary based on the following:

(See [§ 570.487\(b\)\(2\)\(ii\)](#) of this title.)

MSHDA, on behalf of the State of Michigan (the State), published its last AI in 2016. Data and conclusions presented in this AI are outdated; however, there may be a benefit to referencing the document. [MI 2016 AI](#).

- **Fair Housing Planning.** The Consolidated Plan regulations specify that the AFFH certification requires MSHDA to engage in FHP, including: 1) conducting an analysis to identify impediments to fair housing choice in its jurisdiction; 2) taking appropriate actions to overcome the effects of identified impediments; 3) maintaining records to document the analysis and the actions taken; and 4) making the reports/records available and providing due notice as defined by HUD and opportunity for public comment. The three components of FHP are:
 - The AI
 - Actions to overcome the effects of identified impediments, that include milestones, timetables, and measurable results,
 - Maintaining records to support the AFFH certification. Supporting documentation includes the AI, documentation of actions undertaken to eliminate impediments, and transcripts of public hearings, citizen comments/input, and progress reports (which should be kept for public review).

- **Fair Housing Protections.** Fair housing protections are guaranteed through federal, state and local statutes, regulations, executive orders, ordinances and guidelines. The most common of these, the Fair Housing Act (title VII of the Civil Rights Act of 1968) and the Fair Housing Amendments Act of 1988, prohibits discrimination against certain classes of persons based on race, color, religion, sex, national origin, disability and familial status. The Fair Housing Act applies to housing regardless of whether it is developed or otherwise assisted with federal funds. Additionally, height, weight, age, marital status, sexual orientation, and gender identity or expression protections are included in Michigan’s Elliott-Larsen Civil Rights Act.

Note that HUD defines “impediments to fair housing choice” to include specific actions as well as the lack of actions, including:

- Any actions, omissions, or decisions taken because of race, color, religion, sex, disability, familial status, or national origin which restrict housing choices or the availability of housing choices; and,
- Any actions, omissions, or decisions which have the effect of restricting housing choices or the availability of housing choices on the basis of race, color, religion, sex, disability, familial status, or national origin.

Who has to complete an AI?

Michigan's Entitlement Communities

Entitlement communities receive Community Development Block Grant (CDBG) funds directly from the U.S. Department of Housing and Development (“HUD”) and are required to complete an AI. They include three groups:

- Metropolitan cities with populations of at least 50,000 people
- Principal cities of Metropolitan Statistical Areas (MSAs)
- Qualified urban counties with populations of at least 200,000 people (excluding the population of entitled cities)

Michigan's Non-Entitlement Communities

- Michigan's non-entitled communities consist of small cities, townships, and villages of less than 50,000 in population, and non-urban counties that generally are eligible to apply for grants under the Michigan CDBG Program. There are over 1,600 eligible general purpose local governments and these governments are referred to as non-entitled communities. They are not required to complete their own AI.

An AI is an analysis of impediments to fair housing choice in the public and private sector and involves:

- A comprehensive review of housing laws, regulations, and administrative policies, procedures, and practices in the state. The State has a dual responsibility that includes undertaking fair housing planning ("FHP") at the state level and ensuring that state-funded jurisdictions comply with their Affirmatively Furthering Fair Housing ("AFFH") certification.
- An assessment of how these laws, regulations, and administrative policies, procedures, and practices affect the location, availability, affordability, condition, and accessibility of housing in a range of unit sizes and types.
- An evaluation of circumstances, both public and private, affecting fair housing choice for all protected classes.
- An analysis of whether the state has gathered adequate levels of accurate and current data to understand and document the identified fair housing impediments. This determination will be done in conjunction with MSHDA's Office of Market Research.
- An analysis of the evidence that past practices of the state and non-entitlement communities have harmed, limited, or unfairly benefitted any specific group of people.

The AI should include a review of topics that are popularly identified as being related to impediments, including but not limited to:

- Modular vs Stick Built
- Violation of HUD Site neighborhood standards
- Historical and current segregationist policies
- NIMBYism
- Section 3 concerns
- Foreclosure policy and legislation
- Disparate Impact of Michigan Home and Auto Insurance
- Public transportation limitations
- Construction workforce needs
- Homeownership levels based on race and ethnicity
- Tenant selection criteria
- Exclusionary zoning practices
- Other concerns discovered during feedback gathering.

Objectives, Tasks & Activities, and Deadlines

Objectives. To successfully perform the services described in Section I above, the Contractor must satisfy the following objectives:

- Develop an AI for MSHDA based on an analysis of current impediments to fair housing choice that is supported by the most recent and relevant data and information, which may or may not have been included in MSHDA's original 2016 analysis.

- Examine the legacy of housing discrimination in the state, referencing established timeline narratives and information created or gathered by other entities, such as the State's Historic Preservation Office. Particular attention should be paid to past practices that may affect fair housing choice today.
- Compile a summary of additional local protections to determine their growing potential to be implemented statewide (e.g., criminal background, source of income).
- Comply with HUD's Consolidated Planning requirements for affirmatively furthering fair housing, guidance, and materials.
- Implement an inclusive process to ensure that the perspectives of the housing ecosystem, public sector, affected industry professionals, and members of each protected class are considered during the development of the AI.
- Assist MSHDA in establishing an advisory group or coordinating with existing advisory groups to facilitate the development and implementation of the AI recommendations in accordance with the Statewide Housing Plan.
- Develop a feedback and outreach strategy that will include engagement with the [Regional Housing Partnerships](#). This will include attending meetings in every region.
- Organize the report so that the identified impediments can be grouped geographically according to the 15 regions of the [Regional Housing Partnerships](#).
- Link the data found in the [ALICE](#) report to understand the financial hardships experienced by Michiganders.
- Utilize the [Michigan Zoning Atlas](#) created by the Michigan Association of Planning to examine zoning laws and codes.
- Incorporate feedback from MSHDA staff utilizing surveys, feedback sessions, and any other appropriate method.
- Analyze MSHDA's diversity, equity, and inclusion initiatives and identify opportunities to coordinate efforts.
- Identification of progress made toward the recommendations of the previous AI, which are:
 - "Reinvigorating public education efforts around fair housing rights and concerns."
 - "Building a broader institutional awareness around state government's responsibility for AFFH, particularly by identifying and addressing structural barriers to fair housing choice."
 - "Create the institutional infrastructure that will prepare the state to fully comply with the more robust requirements of the AFFH process, including broader participation by departments and agencies beyond simply MSHDA and Michigan Economic Development Corporation ("MEDC") as the primary administrators of HUD funding."
- Identify new actions that can be taken by either/both state and local municipalities to overcome the effects of any identified fair housing impediments.
- Recommend effective record-keeping methods to document actions taken by either/both the state and local municipalities to overcome the effect of any identified fair housing impediments.
- Review state and local laws, regulations and administrative policies, procedures and practices and an assessment of how these laws, regulations, policies, procedures and practices affect the location, availability, affordability, condition and accessibility of housing in the non-entitled communities.
- Assess the conditions, both private and public, affecting fair housing choice for all federal and State of Michigan protected classes.
- Utilize the [State of Michigan Housing Data Portal](#) to access critical housing and community data to better understand local housing needs and opportunities.
- Determine if the state has adequate levels of accurate, and current data to understand and document the fair housing impediments within their AI. This determination will be

- done in conjunction with MSHDA's Office of Market Research.
- Ensure that the appropriate accessibility measures are taken, including but not limited to community engagement, solicitation of feedback, and creation of materials. All efforts should align with MSHDA Accessibility standards.
- Incorporate data and information collected from the fair housing centers of Michigan to better understand trends and current fair housing concerns.
- Incorporate relevant data found in the Statewide Housing Plan, the [Michigan Statewide Housing Needs Assessment](#), or other pertinent information.
- Coordinate with the administrators of [State of Michigan Housing Data Portal](#) to ensure that the data and recommendations from the AI are appropriately included in this tool. are included in this tool.
- Public facing communications and surveys should be translated into Spanish, Arabic, Bengali, and Chinese.
- Ensure that all public facing documents and meetings adhere to the State of Michigan accessibility and language access standards.
- Coordinate activities and project timeline with MSHDA Annual Action Planning process. [This draft of the most recent Action Plan will provide guidance.](#)

Activities/Responsibilities Necessary to Complete Scope of Work. To achieve the objectives, the Contractor shall perform the following activities:

- Identify and implement the best method(s) to collect needed data. This will be done according to guidelines prepared by MSHDA's Office of Market Research.
- Consult with state and local public and private agencies including those that provide assisted housing, health and social services, fair housing centers, planning agencies, public housing authorities, agencies receiving Housing Opportunities for Persons with AIDS funds within the eligible area(s) and any other agencies, institutions or corporations having relevant input for inclusion in the update.
- Collect current and relevant statistical and informational data and the representation thereof in charts and narrative as the basis of the [2016 AI](#) in Michigan's non-entitled communities.
- Facilitate citizen participation activities such as publishing information, coordinating meetings, focus groups and hearings, summarizing and responding to public comment.
- Organize and consolidate all identified impairments to fair housing into a thorough and comprehensive document that meets HUD's proposed guidelines in the [Fair Housing Planning Guide](#).
- Recommend potential actions to be taken by the state and local municipalities to address the identified impediments.

Products or milestones to be met.

- Determination of supporting source documentation for AI.
- A profile of Michigan as a community expressed through data and in a narrative manner.
- A comprehensive summary of all public outreach undertaken to complete the AI.
- Preparation of a summary report denoting the actions undertaken since the 2016 AI that also evaluates the effectiveness of those actions.
- Summaries of transcripts from public hearings, meetings, surveys, and citizen comment/input.
- Attendance at meetings of the Regional Housing Partnerships.
- Development of technical assistance recommendations for all state-funded jurisdictions to promote fair housing choice at the local level with measurable results.

- Draft of AI to MSHDA by March 18, 2025.
- Final document approved by MSHDA prior to May 19, 2025. See Exhibit C below
- One electronic pdf document.
- Quarterly Progress Reports as prescribed below in Exhibit C.

Deadlines for Completing Objectives. The Contractor shall follow the Performance Schedule outlined in Exhibit C attached and incorporated into this Agreement.

Resources

Additional information may be obtained from the following sources:

1. [FHP Guide](#)
 - a. NOTE: Chapter 3, 3.6 AI Areas for Review; State Level - Public and Private Sector Components Pages 3-7 to 3-10 are required.
2. [Fair Housing for HOME Participants](#), a model guide
 - a. NOTE: There is a new proposed rule pending.
3. [CPD Memorandum regarding Affirmatively Furthering Fair Housing in the Community Development Block Program](#)
4. [HUD Fair Housing Toolkit](#)
 - a. The White House, in 2021, also issued a number of Executive Orders that implicate HUD's responsibility for implementing the AFFH mandate, including [Executive Order 13895](#), "Advancing Racial Equity for Underserved Communities Through the Federal Government" and [Executive Order 13988](#), "Preventing and Combating Discrimination on the Basis of Gender Identity or Sexual Orientation."
5. [2016 AI](#)
6. [Redress Movement](#)
7. [Segregated by Design](#)
8. [Mapping Inequality \(richmond.edu\)](#)
9. [Redlining in Michigan \(msu.edu\)](#)
10. [ALICE Report — Michigan Association of United Ways \(uwmich.org\)](#)
11. [Statewide Housing Plan](#)
12. [Michigan Housing Needs Assessment](#)
13. [Action Plan to Advance Property Appraisal and Valuation of Equity](#)

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

EXHIBIT A

NOTICE TO BIDDERS

I. Notifications to Bidders

- A. Revisions to RFP.** If, prior to the proposal deadline, MSHDA 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](#).

- 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 MSHDA will require the Bidder to satisfy the following requirements prior to the execution of a contract with MSHDA. 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 MSHDA, 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 MSHDA, 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 MSHDA, 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 MSHDA, 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 MSHDA, 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 MSHDA.
- e. any claim, demand, action, citation or legal proceeding against MSHDA, 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 MSHDA 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 MSHDA are subject to the Michigan Freedom of Information Act ("FOIA"). In the event a request for submitted documents is made to MSHDA, MSHDA'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 MSHDA as follows:

MSHDA FOIA Coordinator

c/o Legal Affairs

Email: MSHDA-FOIA@michigan.gov

F. Preferences. Michigan law accommodates some bidder preferences:

1. Michigan Based Business

All other things being equal, the state of Michigan must give preference to products manufactured or services offered by Michigan-based firms. See [MCL Section 18.1261](#) and [Section 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](#).

3. Qualified Service-Disabled Veteran-Owned Business

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](#) and [Section 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 MSHDA, of the following minimum insurance coverage:

1. General Liability Insurance for \$1,000,000 with MSHDA 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 MSHDA, 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, MSHDA must seek and obtain Michigan Civil Service approval. The required forms will be submitted to Civil Service prior to MSHDA's Board approval.

Contracts that equal or exceed \$45,000 must be approved by MSHDA'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, MSHDA's Procurement Office will submit the contract to a duly authorized signatory for final execution on behalf of MSHDA. 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 MSHDA and its designated Contract Administrator.

- M. Applicable Laws.** The selected contractor will be required to comply with all Michigan and federal laws, as well as acquire any permits or permission-related documents to provide services being sought.

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

EXHIBIT B

SUBMISSION & SELECTION

I. Submission of Questions

- To ensure a fair and impartial process, MSHDA's Procurement Office will *only* address on time and properly submitted questions.
- Phone calls involving the RFP or related questions will not be accepted. Firms submitting bids shall not contact any Board members or Authority staff.
- All questions and answers related to this RFP will be supplied to Bidders that submitted questions, and/or to organizations providing the Procurement Office with notification of intent to submit a proposal.

- A. Due Date.** Submit all questions regarding the RFP via email by **August 7, 2024, at 4 p.m.** Eastern Time (Detroit). Submissions received at 4:00:01 p.m. Eastern is late and subject to disqualification.

MSHDA will host a Virtual Open House session on **August 19, 2024, at 10:30 AM**. This will serve as an opportunity to discuss the RFP and to ask clarifying questions. This is not mandatory. [Virtual Meeting Link](#)

Responses to properly submitted questions received prior to or at the Open House will be posted on or around **August 7, 2024**.

- B. Delivery of Proposal.** Address questions using the subject line "**AI RFP**" to:

MSHDA-Procurement@michigan.gov

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

II. Submission of Proposal

- Submitted Proposal must adhere to the State of Michigan accessibility standards.
- 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.
- MSHDA shall not be liable for any costs that a Bidder may incur while preparing a proposal.
- MSHDA shall not be liable for any costs that a Bidder may incur prior to the complete execution of a contract.
- If MSHDA enters into a contract, MSHDA's consideration (payment) shall be limited to the term of the contract.

A. Due Date. Proposals responding to this RFP are due **August 28, 2024, 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 MSHDA’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. MSHDA will select the proposal based on Selection Criteria listed below:

1.	Experience, education and/or certification	(30 Points)
2.	Communication skills, including clarity of proposal and writing sample	(20 Points)
3.	Adequacy of proposed methodology, staffing, and time frames for performing services	(15 Points)
4.	Prior Experience completing an AI	(20 Points)
5.	<u>Feasibility of fee as determined by budget constraints</u>	<u>(15 Points)</u>
	Total Possible Points:	100 Points

Note: MSHDA 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. MSHDA's review may take up to four weeks after the closing date for submitting proposals. MSHDA anticipates notifying the selected contractor on or about September 16, 2024 via e-mail and posting on MSHDA's website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and MSHDA's Board.

C. Cancellation of Selected Proposal. The selection of a proposal by MSHDA may be cancelled at any time prior to the complete execution of a contract. If MSHDA cancels its selection of a proposal, MSHDA 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 MSHDA to evaluate the services and methods proposed.

II. Headers and Contents

Proposals not including requested information may be viewed by MSHDA as non-responsive and not considered further. Bidders are strongly encouraged to review their proposals prior to submission to ensure that all requested information is included.

A. Company Background Information.

1. Legal business name and address.

[Name]

[Street Address]

[City, State, Zip]

[Phone Number]

[Website address]

2. The type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company, foreign).

Note: Prior to contract execution, the selected contractor will be required to provide proof of authorization to conduct business in the State of Michigan.

3. Any applicable "Doing Business As" names.

4. Any branch office, or name and address of registered agent, if applicable.
5. Legal business name of any applicable parent company, and its address.
6. State your business is incorporated in.
7. Number of years in business and number of employees.
8. Has there been a recent change in the organizational structure (e.g., management team) or a change of control (merger or acquisition)?
(Yes / No)
If yes, why and how has it affected your company?
9. Has your company ever been debarred, suspended, or otherwise disqualified from bidding, proposing, or contracting with any governmental entity, including the State?
(Yes / No)
If yes, provide the date, governmental entity, and details surrounding the action.
10. Has your company ever been sued by the State of Michigan?
(Yes / No)
If yes, provide the date, case caption, case number, and identify the court that the case was filed in.
11. Has your company ever sued the State of Michigan?
(Yes /No)
If yes, provide the date, case caption, case number, and identify court that case was filed in.
12. Within the past five (5) years, has your company defaulted on a government contract, or been terminated for cause by any governmental entity, including the State?
(Yes / No)
If yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.
13. Within the past five (5) years, has your company defaulted on a contract or been terminated for cause by any private entity in which similar service or products were being provided by your company?
(Yes / No)
If yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.

14. Does your company have experience working with the State of Michigan?

(Yes / No)

If yes, please provide a list (including the contract number) of the contracts you hold or have held with the State for the last 10 years.

B. Management and Personnel. Answer/Address the following:

1. **Authorized Signatory.** The Bidder must clearly identify the name and title of an official authorized to commit the Bidder to the terms and conditions of the proposal.
 - a. Provide any resolution(s) authorizing the designated official as an approved signatory.
 - b. Proposal must include the statement of bid commitment, see Section H below, signed by the approved signatory.

2. **Officer and Management Summary.** Identify manager(s) and/or officer(s) who will manage the contract if it is awarded:
 - a. Provide current contact information including the manager/officer name, title, mailing address, email address, and phone and fax numbers.
 - b. Provide their resumes or CVs.
 - c. List their responsibilities and the specific tasks each assigned officer/manager will carry out and the anticipated time frames for each task.

3. **Personnel Summary.** Identify proposed key project personnel, including job titles, responsible for performing the activities / services described in the Scope of Work.

4. **Submit a Certificate Verifying Project Personnel.** The form is found in Exhibit D, attached and incorporated into this RFP.
 - a. Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan. Review Exhibit A, Section I.I above for important information regarding Pensioned Retirees.

C. Experience.

1. **Prior Experience of Bidder.** Indicate prior experience of your organization that you consider relevant to the successful accomplishment of the project described in this RFP.
 - a. Include sufficient detail to demonstrate the relevance of such experience.
 - b. Include descriptions of qualifying experience, including project descriptions, costs, and start/end dates of projects successfully completed.
 - c. Include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
 - d. MSHDA has identified the following qualifications that it believes are necessary for the successful performance and completion of the services described in the Scope of Work:
 - i. Experience providing consulting services and technical information relating to HUD, fair housing, or DEI-related programs.
 - ii. Have experienced personnel to perform the services, or have personnel supervised by experienced staff.

2. **Experience of Proposed Personnel Assigned to Provide Services.** The proposal should describe the education and experience of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel.

3. **Examples of Work.** The following example of recent work shall be submitted with the Bidder's proposal:
 - a. Recent consultation arrangements related to HUD, fair housing, or DEI programs. The scope and nature of consultation related to HUD, fair housing, or DEI programs.
 - c. Recent training and training syllabi related to HUD, fair housing, or DEI programs; and
 - d. Any examples of consultation or training deemed related to the services being sought by MSHDA.

4. **Professional References.** Include professional references who can provide information regarding the Bidder's prior past performance.

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

D. Proposed Services.

1. **How Services Will be Rendered.** Address and describe the process used to render the services and how the services will be rendered. This should be an overview of the methodology to be used, based on staff and time frames, to meet the project scope of work and complete the required services within the time frame of the project.

2. Use of Subcontractors. If any work will be subcontracted, describe the following:

- a. Work that will be subcontracted.
- b. The process used to select the subcontractors.
- c. The subcontractor's experience and expertise.
- d. The names of the firms/individual(s) who will perform the subcontracted work.
- e. How quality of service will be monitored and ensured.

3. Standards. Describe or address the following:

- a. The standards that the services will satisfy. (If standards of a professional association will be followed, identify the standards and the association.)
- b. How quality of service will be monitored and ensured.
- c. Whether "best practices" will be followed. (If applicable, identify the organization and/or document establishing such standards.)

4. Security of Data. If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:

- a. Has your organization established and used a policy to address the security of paper and electronic data?

(Yes / No)

If No, explain how your organization addresses the security of paper and electronic data.

(Note: Please do not submit a copy of your security policy.)

- b. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your firm's policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)

(Yes / No)

If No, explain how your organization handles confidential and/or personal data.

5. Copyrighted Materials. Acknowledge and/or confirm the following:

- a. You agree that all products produced as a result of this contract shall be the property of MSHDA.
- b. You agree that MSHDA 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. See [current travel information](#).

- 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 MSHDA is the lender, and any grants made by or administered by MSHDA.

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 MSHDA 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 MSHDA 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 MSHDA.

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

(Yes / No)

If yes, please confirm whether any potential conflict of interest will exist if MSHDA 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 MSHDA?

(Yes / No)

If yes, include an organizational chart from each entity under contract or awarded a grant from MSHDA 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.

MSHDA 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 MSHDA?

(Yes / No)

If yes, please provide their name and the name of the family member currently employed at MSHDA.

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

I confirm that I have submitted this proposal on behalf of

_____ in response to the
**Michigan State Housing Development Authority's Request for Proposals for
Contract to perform an Analysis of Impediments.**

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

By: _____

Its: _____

Date: _____

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**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSAL
EXHIBIT D
PROJECT PERSONNEL**

CERTIFICATE VERIFYING PROJECT PERSONNEL OF THE CONTRACTOR/SUBCONTRACTOR

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

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

Title with Contractor/Subcontractor _____

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

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

Title with Contractor/Subcontractor _____

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

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)