



REQUEST FOR PROPOSALS

DATE OF ISSUE: October 19, 2022

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for provide Comprehensive Need Assessment (“CNA”)**

Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	October 26, 2022	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	October 31, 2022	
Proposal deadline:	November 16, 2022	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	January 1 , 2023	

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

I. Services Sought by Authority

The Michigan State Housing Development Authority ("Authority") is seeking an organization authorized to do business in Michigan to provide Comprehensive Need Assessment (“CNA”) services for Authority financed multifamily housing developments.

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

It is anticipated that a three-year(s) contract may be awarded. The Contract may be renewed for up to three (3) additional one (1) year period(s). Renewal is at the sole discretion of the Authority. The Authority will document its exercise of renewal options via a Contract Amendment.

II. Contents of this RFP

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

III. Overview

The Authority seeks a Comprehensive Needs Assessment service provider (“Bidder” or “selected contractor”) to complete CNAs for Authority-financed multifamily housing developments.

The selected contractor will provide services to help address and determine the current and future physical and financial needs of Authority-financed multifamily developments projected over the next 20 years. The CNA will enable the Authority to accurately determine the current and future physical needs of Authority-financed developments while also ensuring that adequate funding exists to maintain the developments in safe, decent, and sanitary condition over the next 20 years. The current condition and future physical needs are established through a detailed physical inspection of the development. Projected financial needs to maintain the physical condition of the development are established through a detailed analysis of the financial history, current status including escrow balance and funding levels, and future needs based on results of the physical inspection.

In addition, the selected contractor will provide these services to identify the physical needs and resulting needed funding for the Authority’s aging portfolio. The services will protect the Authority’s mortgage loan interests by assuring adequate funding and completion of physical repairs on multifamily developments which are eight or more years old. The CNA is used in budget preparation, determining rent increases, prioritizing the use of development reserves which include replacement reserve and surplus cash and planning for future physical and financial needs of the developments. The CNA is used extensively with Preservation proposals.

The previous CNA must be updated to reflect current physical conditions and Replacement Reserve funding if a development has an existing CNA that is ten or more years old OR the Authority has specifically requested a CNA. This will include a complete re-inspection of the development, analysis of Replacement Reserve funding and recommendations for funding adjustments if necessary.

The Authority reserves the right to add or delete properties to 2023-2027 CNA Property List (“Exhibit E”) during the term of this contract.

Preservation CNAs will be completed when specifically requested by the Authority. Additional detail is found in Section IV.B.4 and 5 below.

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

IV. Objectives, Tasks & Activities

A. General Objectives. To successfully perform the services described in Section III above, the selected contractor must meet the following general objectives:

1. Provide a detailed physical inspection of development.
2. At a minimum in multifamily developments, 10% of the units will be individually inspected in developments with 150 or more units and 15% of the units will be inspected on developments with 149 or less units. Each type of unit must be included in the inspection process.
3. Verify dimensional data from plans and/or field measurements to assure proper costing of repairs and/or replacement.
4. Review and analyze capital expenditures, escrow balances and resulting future financial needs.
5. Provide a detailed analysis of the Replacement Reserve escrow and estimated future needs that will need to be completed for a 20-year term.
6. Provide a preliminary report for each development with detailed narrative presentation, photographs enhanced with graph presentations and spreadsheet format for projected Capital Needs and Replacement Reserve funding of the development.
7. The preliminary report will be reviewed with Authority staff, the management agent, and/or owner. A final report will then be prepared.

B. General Tasks & Activities To achieve the objectives, the selected contractor shall perform the following activities:

1. The Authority will receive five (5) printed and bound copies each of the preliminary and final report. In addition, the Physical Needs Assessment Narrative, Fannie Mae Spreadsheet, Capital Needs Summary, and Replacement Reserve Analysis will be received on CD or electronically using Microsoft Word and Excel format with each report.
2. The selected contractor will complete between one and three (1-3) CNAs each month unless an accelerated or reduced rate is agreed to by both parties. The Contractor will be expected to complete between forty and sixty (40-60) CNAs each year over a five-year period unless otherwise directed by the Authority.

3. The selected contractor will be responsible for all scheduling, notifying specific developments and Authority staff of dates for completion of CNAs. Unless otherwise acceptable to all parties, at least 30-days advance notice of impending inspections will be provided to the development and Authority. At least 15 calendar days' notice of inspection date and time will be provided to the development and Authority for specific site inspections.
4. During the five-year term of the agreement, the Authority may request priority for approximately 40 developments for completion of a CNA. A priority may be placed resulting from an application for preservation, refinancing, sale, workout, etc. The selected contractor will make necessary arrangements to complete such priority CNAs as soon as reasonably possible.
5. Developments identified for Preservation will include a special Capital Needs Analysis and related Replacement Reserve Analysis. These analyses will include a substantial amount of development capital needs to be completed in year one. Appropriate additions to the narrative section of the CNA will be required to reflect the Preservation proposal.
 - a. An Excel spreadsheet listing all capital improvements for the duration of the CNA is to be provided. The spreadsheet shall be laid out to easily track changes from the initial to final Preservation Capital Needs Assessment (PCNA).
6. To the extent available, the Authority and/or management agent will provide the selected contractor with:
 - a. Development and management agent names, addresses, phone numbers and contract persons.
 - b. Access to original plans and specifications.
 - c. Financial information including escrow balances, mortgage amounts and terms, monthly escrow balances, previous 12-months income and expenses, monthly escrow deposits, mortgage maturity dates, and any other pertinent information requested by the Contractor.
 - d. Access to developments.

C. Specific Tasks & Activities. The selected contractor shall perform the tasks/activities and complete the objectives in accordance with the following standards:

1. At a minimum in multifamily developments, 10% of the units will be individually inspected in developments with 150 or more units and 15% of the units will be inspected in developments with 149 or less units. Each type of unit must be included in the inspection process.

2. Provide detailed physical inspection of development including: (a) site concrete/asphalt walks, driveways, parking areas and play areas; (b) site lighting must be reviewed along with plantings, lawn areas, grading for soil erosion and trash dumpster areas; (c) all interior and exterior building components, including common area and unit plumbing, mechanical and electrical systems.
3. Dimensional data will need to be obtained from plans and/or field measurements to assure proper costing of repairs and/or replacement.
4. Review and analysis of capital expenditures, escrow balances and resulting future financial needs. A detailed analysis of the Replacement Reserve escrow and estimated future needs will be completed for a 20-year term.
5. Provide a preliminary report for each development with detailed narrative presentation, photographs enhanced with graph presentations and spreadsheet format for projected Capital Needs and Replacement Reserve funding of the development. Reports will be developed with the Fannie Mae model for multifamily physical needs assessments or another similar product approved by the Authority.
6. The preliminary report will be reviewed with Authority staff, the management agent, and/or owner. Developments noted to be “troubled” or with otherwise unique conditions may, at the discretion of the Authority, require face-to-face meetings with the selected contractor. Such meetings will be conducted at the Authority’s Detroit or Lansing office (or other agreeable location) at such time as the selected contractor has staff available in Michigan. The selected c-Contractor will have staff available in Michigan at least once a month for the duration of the contract. A final report will then be prepared and delivered.

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

EXHIBIT A

NOTICE TO BIDDERS

I. Notifications to Bidders

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

Proposals from Sole Proprietors Will Not be Accepted

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

http://www.michigan.gov/lara/0,4601,7-154-61343_35413---,00.html.

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

If awarded a contract, the Bidder agrees to:

1. Indemnify, defend and hold harmless the Authority, its Board, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:
 - a. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from (1) the services provided ("Services") or (2) performance of the Services, duties,

responsibilities, actions or omissions of the Bidder or any of its subcontractors under an awarded contract.

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

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

Please submit FOIA requests to the Authority as follows:

MSHDA FOIA Coordinator
c/o Legal Affairs
Email: MSHDA-FOIA@michigan.gov

F. Preferences. Michigan law accommodates some bidder preferences:

1. Michigan Based Business

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

2. Geographically-Disadvantaged Business

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

3. Qualified Service-Disabled Veteran-Owned Businesses

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

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

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

H. Insurance Coverage. The Bidder must maintain and provide evidence, satisfactory to the Authority, of the following minimum insurance coverage:

1. General Liability Insurance for \$1,000,000 with the Authority shown as additional insured;
2. Errors and Omissions Insurance for \$1,000,000 for each occurrence and \$1,000,000 annual aggregate;
3. Worker's Compensation Insurance (if required under state law). Any citing of a policy of insurance must include a listing of the States where that policy's coverage is applicable.
4. If required by the Authority, Cyber Security Insurance for \$1,000,000.

- I. Payments to Pensioned Retirees.** 2007 PA 95, MCL 38.68c requires retirees of the State Employees Retirement System (“Pensioned Retirees”) who become employed by the State either directly or indirectly through a contractual arrangement with another party on or after October 1, 2007 to forfeit their respective state pensions for the duration of their reemployment. **Accordingly, any pensioned retiree who provides or renders services pursuant to the contract for which bids will be made under this RFP shall be required to forfeit his or her pension during the term of the contract.**

Proposals must acknowledge and confirm whether pensioned retirees will render services under the contract being sought through this RFP. If the Bidder intends to use a pensioned retiree, the Bidder must submit written confirmation from the pensioned retiree that he or she agrees to forfeit his or her pension during the term of the contract, if awarded. If awarded a contract, the Bidder must submit a copy of the pensioned retiree’s directions to the State of Michigan’s Office of Retirement Services (“ORS”) to withhold the retiree’s pension payments until the end of the contract term by having the pensioned retiree complete a Retiree Rehire Certificate. A copy of the Retiree Rehire Certificate will be required to be submitted prior to executing an awarded contract.

- J. Contract Award Approvals.** Prior to executing an awarded contract, the Authority must seek and obtain Michigan Civil Service approval. The required forms will be submitted to Civil Service prior to the Authority’s Board approval.

Contracts that equal or exceed \$45,000 must be approved by the Authority’s Board. Thereafter, an awarded contract will be forwarded to the selected Bidder with instructions to review and sign it. Upon receiving the signed contract, the Authority’s Procurement Office will submit the contract to a duly authorized signatory for final execution on behalf of the Authority. One fully executed contract will then be returned to the selected contractor.

- K. Commencement of Work.** Project work shall not commence until execution of a project contract. The selected contractor shall not proceed with performance of the project work or incurring of project costs until both parties have signed the project contract to show acceptance of its terms and conditions.

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

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

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

EXHIBIT B

SUBMISSION & SELECTION

I. Submission of Questions

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

A. Due Date. Submit all questions regarding the RFP via email by **October 26, 2022** at **4 p.m.** Eastern Time (Detroit). Submissions received at 4:00:01 p.m. Eastern is late and subject to disqualification.

Responses to properly submitted questions will be posted on or around **October 31, 2022**. The Authority will hold no other question sessions or bidder's conferences.

B. Delivery of Proposal. Address questions using the subject line ***Comprehensive Need Assessment RFP*** to:

MSHDA-Procurement@michigan.gov

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

II. Submission of Proposal

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

A. Due Date. Proposals responding to this RFP are due **November 16, 2022 at 4 p.m.** Eastern Time (Detroit). Submissions received at 4:00:01 p.m. Eastern is late and subject to disqualification.

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

C. Delivery of Proposal. Direct all deliveries to:

MSHDA-Procurement@michigan.gov

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

III. Selection of Proposal

The selection of a proposal shall be subject to a review by the Authority's Legal Affairs Division concerning conflicts of interest and/or participation in Authority programs by the Bidder, its officers, employees, subcontractors or independent contractors.

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

1.	Experience, of firm in completion of CNAs as noted in the Scope of Work	45
2.	Presentation/format of previously completed CAN	20
3.	Communication skills, including clarity of proposal	10
4.	Education, certification and experience of staff necessary to perform services	10
5.	Ability to perform services within established timeframes	15

Total Possible Points: 100

Proposals receiving **80** or more technical evaluation points will have pricing evaluated and considered for award. The Authority may utilize all bidder information, without regard to a proposal's technical score, to determine fair market value for goods or services sought. The Authority is not obligated to accept the lowest price proposal.

B. Proposal Selection. The Authority's review may take up to four weeks after the closing date for submitting proposals. The Authority anticipates notifying the selected contractor on or about December 12, 2022 via e-mail and posting on the Authority's website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and the Authority's Board.

C. Cancellation of Selected Proposal. The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals. Reasons for canceling the selected proposal may include, but are not limited to, the following:

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

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

EXHIBIT C

PROPOSAL FORMAT

I. Overview

- Proposals must be submitted in the format described in this Exhibit C as outlined below.
- There should be no attachments, enclosures or exhibits other than those considered by the Bidder to be essential to a complete understanding of the proposal.
- Each section must be clearly identified with appropriate headings and/or table of contents.
- The proposal should be clear, accurate, and complete, with sufficient detail to enable the Authority to evaluate the services and methods proposed.

II. Headers and Contents

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

A. Company Background Information.

1. Legal business name and address.
 - [Name]
 - [Street Address]
 - [City, State, Zip]
 - [Phone Number]
 - [Website address]
2. The type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company, foreign).
 - Note:* Prior to contract execution, the selected contractor will be required to provide proof of authorization to conduct business in the State of Michigan.
3. Any applicable “Doing Business As” names.
4. Any branch office, or name and address of registered agent, if applicable.
5. Legal business name of any applicable parent company, and its address.
6. State your business is incorporated in.
7. Number of years in business and number of employees.

8. Has there been a recent change in the organizational structure (e.g., management team) or a change of control (merger or acquisition)?
(Yes / No)
If Yes, why and how has it affected your company?
9. Has your company ever been debarred, suspended, or otherwise disqualified from bidding, proposing, or contracting with any governmental entity, including the State?
(Yes / No)
If Yes, provide the date, governmental entity, and details surrounding the action.
10. Has your company ever been sued by the State of Michigan?
(Yes / No)
If Yes, provide the date, case caption, case number, and identify the court that the case was filed in.
11. Has your company ever sued the State of Michigan?
(Yes /No)
If Yes, provide the date, case caption, case number, and identify court that case was filed in.
12. Within the past five (5) years, has your company defaulted on a government contract, or been terminated for cause by any governmental entity, including the State?
(Yes / No)
If Yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.
13. Within the past five (5) years, has your company defaulted on a contract or been terminated for cause by any private entity in which similar service or products were being provided by your company?
(Yes / No)
If Yes, provide the date of action, contracting entity, type of contract, and details surrounding the termination or default.
14. Does your company have experience working with the State of Michigan?
(Yes / No)
If Yes, please provide a list (including the contract number) of the contracts you hold or have held with the State for the last 10 years.

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

1. **Authorized Signatory.** The Bidder must clearly identify the name and title of an official authorized to commit the Bidder to the terms and conditions of the proposal.
 - a. Provide any resolution(s) authorizing the designated official as an approved signatory.
 - b. Proposal must include the statement of bid commitment, see Section H below, signed by the approved signatory.
2. **Officer and Management Summary.** Identify manager(s) and/or officer(s) who will manage the contract if it is awarded:

- a. Provide current contact information including the manager/officer name, title, mailing address, email address, and phone and fax numbers.
 - b. Provide their resumes or CVs.
 - c. List their responsibilities and the specific tasks each assigned officer/manager will carry out and the anticipated time frames for each task.
3. **Personnel Summary.** Identify proposed key project personnel, including job titles, responsible for performing the activities / services described in the Scope of Work.
4. **Submit a Certificate Verifying Project Personnel.** The form is found in Exhibit D, attached and incorporated into this RFP.
 - a. Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan. Review Exhibit A, Section I.I above for important information regarding Pensioned Retirees.

C. Experience.

1. **Prior Experience of Bidder.** Indicate 3 prior experience of approximately the same size and scope of this RFP that your organization considers relevant to the successful accomplishment of the project described in this RFP.
 - a. Include sufficient detail to demonstrate the relevance of such experience.
 - b. Include descriptions of qualifying experience, including project descriptions, costs, and start/end dates of projects successfully completed.
 - c. Include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
2. **Experience of Proposed Personnel Assigned to Provide Services.** The proposal should describe the education and experience of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel.
3. **Examples of Work.** The following example of recent work shall be submitted with the Bidder's proposal:

A copy of a previously completed CNA must be included with the proposal.
4. **Professional References.** Include 3 professional references who can provide information regarding the Bidder's prior past performance.
5. **Additional Information and Comments.** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

D. Proposed Services.

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

E. Price Proposal & Budget

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

Proposals should reflect per diem rates in effect at the time of proposal submission. State per diem rates are subject to change during the term of an awarded contract. Current travel information can be found here:

https://www.michigan.gov/dtmb/0,5552,7-358-82548_13132---,00.html

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

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

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

Include a timetable indicating how the project will be scheduled.

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

G. Disclosures.

- 1. Interests in Authority Programs.** Authority programs include, but are not limited to, the Housing Voucher Program, any loans where the Authority is the lender, and any grants made by or administered by the Authority.
 - Does the Bidder, its officers, board members, and employees respectively, have any interests in Authority programs?
(Yes / No)
If Yes, please provide their name, title, and the Authority program for which the interests exist.

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

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

- a. Is the Bidder currently under contract and/or been awarded a grant from the Authority?
(Yes / No)
If Yes, please confirm whether any potential conflict of interest will exist if the Authority enters into a contract with the Bidder.
- b. Does the Bidder, its officers, board members, and employees, hold a position with another entity that may be under contract or receiving a grant from the Authority?
(Yes / No)
If Yes, include an organizational chart from each entity under contract or awarded a grant from the Authority in which the Bidder or project personnel holds a position. Include each employee's position and title within the entity. In addition, indicate whether the Bidder or the project personnel is responsible for making financial decisions in his/her capacity and what measures have been implemented to ensure that funds are not comingled.

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

3. Family Members Who Work for Authority.

- a. Does the Bidder, its officers, board members, and employees respectively, have family members who work for the Authority?
(Yes / No)
If Yes, please provide their name and the name of the family member currently employed at the Authority.

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**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)

MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

REQUEST FOR PROPOSAL

EXHIBIT E

2022-2027 CNA PROPERTY LIST

MSHDA#	Name	Cutoff	Last CNA Date	Next CNA
934	BAY HILL	8/11/2016	9/6/2019	2023
1054	BIG BEND APTS.	11/1/2004	3/4/2013	2023
524	BRETON VILLAGE GREEN	12/23/2016	9/28/2015	2023
528	CALUMET	1/11/2008	10/28/2013	2023
630	CAPITOL COMMONS	2/4/2016	9/4/2012	2023
1727	CEDARSHORES	5/30/2016	7/8/2021	2023
929	CENTRE STREET VILLAGE	5/11/2015	7/25/2013	2023
330	CHARRING SQUARE	12/28/2007	10/7/2013	2023
3634	COLUMBIA COURT*	5/6/2016	6/24/2014	2023
1066	CREEKSIDE VILLAGE	2/11/2006	10/24/2013	2023
1071	DEER CREEK	3/23/2006	10/3/2013	2023
1042	ELMHAVEN MANOR	4/12/2005	11/27/2013	2023
1077	EMERALD CREEK II	9/29/2005	7/26/2013	2023
1842	FALCON WOODS APTS	6/22/2016	5/16/2014	2023
1409	FIELD STREET I LDHALP	3/13/1993	8/20/2013	2023
1414	FIELD STREET II LDHA LP	12/20/1997	8/20/2013	2023
546	FRASER WOODS	10/20/2016	6/24/2014	2023
1044	GREEN MEADOWS	1/24/2004	4/11/2013	2023
999	HOPE WOODS SENIORS	12/7/2004	11/4/2013	2023
848	JEFFERSON MEADOWS	3/30/2007	12/2/2013	2023
3630	LINCOLNSHIRE TOWNHOMES	5/5/2016	6/17/2014	2023
935	MARSH POINTE	12/5/2016	9/5/2018	2023
3489	MARSH RIDGE - NEW	10/1/2016	10/12/2016	2023
527	MCCOY TOWNHOUSES	4/24/2008	11/4/2013	2023
526	MCDONALD SQUARE	9/4/2007	12/2/2013	2023
38	MEADOW LANES APARTMENTS	10/13/2016	9/12/2013	2023
1040	MEADOWS @ BROWNSTOWN	1/19/2005	9/19/2013	2023
1032	NISBETT & FAIRMAN	4/4/2004	2/25/2013	2023
1026	OAKHAVEN MANOR	1/6/2004	2/25/2013	2023
3051	PARK PLACE APARTMENTS	7/18/2006	10/7/2013	2023
537	PARKWAY MEADOWS	12/31/2016	8/1/2014	2023
3540	PHELPS SQUARE	6/11/2016		2023
1061	REDFORD MANOR	2/16/2006	9/12/2013	2023
3030	ROMULUS TOWER	12/16/2006	10/3/2013	2023
1081	ROSEWOOD RIVERSIDE	1/30/2006	8/19/2013	2023

960	SHILOH COMMONS	5/11/2015	10/13/2014	Preservation	2023
614	SOUTH HILL APTS	8/20/2007	12/2/2013		2023
3486	ST GEORGE TOWER*	8/31/2016	8/16/2012		2023
1086	STONEBRIDGE APTS.	8/7/2005	6/17/2013		2023
3542	STONEBROOK I & II	8/31/2016	8/9/2021		2023
1065	STONEY CREEK VILLAGE	1/24/2005	9/19/2013		2023
3640	SWAYZE COURT	11/29/2016			2023
693	VILLAGE PARK	7/29/2016	7/2/2018		2023
346	WAYNE TOWER	12/1/2006	1/28/2013		2023
1063	WILLOW GROVE TOWNHOUSES	12/1/2005	10/24/2013		2023
3708	AHEPA 371*	10/23/2017			2024
1425	ARBORDALE APTS	4/30/2017	8/24/2015		2024
899	BALDWIN HOUSE	1/1/1995	3/26/2014		2024
1072	BAYBERRY FARMS	4/14/2005	9/2/2014		2024
3119	BRAIDWOOD MANOR APARTMENTS	10/1/2007	4/16/2014		2024
468	BURTON PLACE	5/23/2019	11/10/2014		2024
573	BUTTERNUT CREEK	2/22/2011	10/13/2014		2024
749	CAPITOL COMMONS II	8/4/1989	2/27/2014		2024
3523	CARSON SQUARE APTS	4/14/2017			2024
3748	CHASE RUN APTS	12/21/2017	9/5/2019		2024
1076	CROSSROADS APTS.	3/2/2005	4/7/2014		2024
462	CROSTOWN PARKWAY	7/29/2008	3/3/2014		2024
1039	DUVERNAY PARK	6/19/2004	9/15/2014		2024
3061	ELMCREST VILLAGE	8/31/2006	9/2/2014		2024
1104	EMERALD PARK II	6/7/2006	5/5/2014		2024
3037	EMERALD WOODS	6/26/2007	5/5/2014		2024
546	FRASER WOODS	10/20/2016	6/24/2014		2024
1083	GIBRALTAR MANOR	9/8/2006	6/24/2014		2024
641	GREENBRIAR APTS	1/29/2010	8/15/2014		2024
575	HILLSDALE/BEACON HILL	2/22/2011	10/27/2014		2024
883	HOPE SENIOR APTS.	6/15/1994	10/30/2014		2024
1106	ISLAND CITY APARTMENTS	4/6/2007	7/30/2014		2024
962	KEARSLEY-DALY VILLA	10/2/1999	9/15/2014		2024
1124	KINGSBURY PLACE APARTMENTS	1/0/1900	12/9/2014		2024
61	LIBERTY COMMONS	11/24/2006	11/12/2014		2024
1051	LOCKWOOD OF FENTON	11/7/2007	8/5/2014		2024
1055	MAPLE RIDGE WEST	1/30/2005	9/15/2014		2024
631	MAPLE VILLAGE	2/2/2017	9/23/2020		2024
1100	MAPLE VILLAGE II	2/20/2007	9/22/2014		2024
3688	NORTHWIND APT HOMES	9/21/2017			2024
3603	PARKVIEW APTS	3/25/2017	8/18/2014		2024
700	PINE CREEK	11/30/1988	7/14/2014		2024

566	RIVERFRONT	5/12/2017	3/11/2022		2024
3059	RIVERVIEW TERRACE - Petosky	8/31/2006	7/30/2014		2024
1102	SETTERS POINTE II	5/24/2006	10/13/2014		2024
3029	SOLBERG TOWER	12/16/2006	4/7/2014		2024
3031	THE VILLAGE AT APPLIEDORN	6/17/2007	8/21/2014		2024
597	VAN DYKE CENTER	8/27/2007	6/2/2014		2024
3027	VICTORIAN TRAILS	8/19/2007	10/20/2014		2024
1110	VILLAGE AT BAY RIDGE II	11/15/2006	10/3/2014	Preservation	2024
564	VILLAGE MANOR	6/28/2017	1/23/2015		2024
1101	VILLAGE OF OAKLAND WOODS II	9/28/2007	10/27/2014		2024
15	WALLED LAKE VILLA	6/30/2017	11/20/2015		2024
1088	WHITE PINES	6/29/2006	10/13/2014		2024
436	YOUNG MANOR	2/1/2007	5/5/2014		2024
1036	1777 HASLETT ROAD	9/17/2007	6/11/2015		2025
3549	435 LAGRAVE @ TAPESTRY SQUARE	2/18/2018			2025
1635	AMBROSE RIDGE APTS	6/7/2018			2025
3003	BELLEVUE PLACE II	5/2/2007	4/30/2015		2025
654	BIRCH PARK	12/14/2012	2/23/2015		2025
926	BRACKEN WOODS	1/20/2018	2/23/2015		2025
1410	CARRIAGE TOWN SQUARE APARTMENT	1/30/1995	4/27/2015		2025
3020	CARROT WAY APTS	2/14/2006	9/4/2015		2025
980	CEDARWOOD SR. APTS.	2/17/2001	6/11/2015		2025
1041	COUNTRY VILLAGE	7/15/2006	4/30/2015		2025
671	COVENTRY WOODS	5/18/2006	2/18/2015		2025
289	DAUNER HAUS	8/18/2008	2/27/2015		2025
1096	DELHI STRATFORD	10/18/2006	9/4/2015		2025
3150	DUKE BARRINGTON APARTMENTS	1/0/1900	8/14/2015		2025
968	GRANDHAVEN MANOR	1/27/2001	8/3/2015		2025
1084	GREEN PARK TOWNHOMES	9/2/2006	3/13/2015		2025
508	GREENWOOD VILLA	4/13/2018	8/1/2020		2025
1443	HERON COURTYARD	1/0/1900	8/3/2015		2025
513	LAKELAND PLACE	10/27/1978	8/19/2015		2025
993	LAKESHORE VILLAGE II	11/30/2018	7/9/2009		2025
1089	MALLARD POND	3/23/2007	8/14/2015		2025
758	MILL PARK TOWNHOMES	12/15/1988	4/3/2015		2025
622	OTSEGO	4/28/2018	5/13/2019		2025
246	PINE OAK	1/0/1900	3/6/2015		2025
1080	PRESTON POINTE	1/0/1900	2/18/2015		2025
3639	PRESTWICK VILLAGE	4/17/2018	None		2025
1090	QUAIL RIDGE	2/23/2007	8/14/2015		2025
352	RENAISSANCE OF BRIDGE VILLAGE	5/31/2018	5/30/2018		2025

134	RIVERVIEW TERRACE - Adrian	9/30/2003	1/2/2015		2025
2193	SILVER CREEK	2/27/2018			2025
966	STONEBROOK III	2/20/2007	6/1/2015		2025
697	SUMMER HAVEN	2/18/2014	9/21/2015		2025
976	THE VILLAGE AT BAY RIDGE	3/24/2001	8/20/2015		2025
564	VILLAGE MANOR	6/28/2017	1/23/2015		2025
906	VISTA VILLA	2/4/1995	1/15/2015		2025
15	WALLED LAKE VILLA	6/30/2017	11/20/2015		2025
3724	WOODLAND PLACE	10/17/2018			2025
1654	ASHTON RIDGE APTS	7/31/2019	3/12/2020		2026
1655	ASPEN HILLS*	8/29/2019	10/4/2021		2026
3759	BETHANY VILLA I & II*	5/30/2019			2026
468	BURTON PLACE	5/23/2019	11/10/2014		2026
3074	COBBLESTONE VILLAGE APARTMENTS	8/12/2008	9/19/2016		2026
3098	EMERALD WOODS SENIOR	12/7/2008	4/29/2016		2026
3341	HEARTHSTONE APARTMENTS	11/30/2010	4/6/2016		2026
3602	HEATHER GARDENS	3/30/2019	2/16/2022		2026
904	HELEN ODEAN BUTLER APARTMENTS	5/20/1996	12/5/2016		2026
3746	KAMPER STEVENS*	6/20/2019	5/14/2021		2026
1025	LAKE HURON WOODS SR.	1/7/2005	12/7/2016		2026
3716	LAKESHORE VILLAGE III	9/5/2019			2026
992	LIGHTHOUSE VILLAGE	12/19/2001	4/29/2016		2026
974	LOST CREEK	5/31/2000	3/11/2016		2026
967	M.A.HOUSTON APTS.	10/24/2019	5/8/2015		2026
684	NEW CENTER COMMONS	10/27/2010	8/15/2016		2026
3013	NORTHLAND MEADOW	3/16/2008	12/19/2016		2026
3022	OTTAWA COUNTY SUPPORTIVE HOUSING	6/7/2008	10/19/2016		2026
1123	PINEBROOK MANOR	5/19/2005	11/14/2016		2026
3089	POND STREET VILLAGE	12/21/2008	8/15/2016		2026
991	SWANHAVEN MANOR	1/3/2002	10/24/2016		2026
1002	THORNTREE	10/31/2001	7/29/2016		2026
3057	TOWNLIN APARTMENTS	3/15/2008	8/15/2016		2026
147	TRADEWINDS EAST	3/31/1975	7/29/2016		2026
882	UNIVERSITY CLUB APTS	2/28/1994	4/29/2016		2026
2276	WALNUT GROVE	6/7/2019			2026
885	WAVERLY MEADOWS	11/24/1993	9/22/2016		2026
950	WAVERLY MEADOWS II	6/23/1998	9/22/2016		2026
3783	WESTCHESTER VILLAGE APARTMENTS EAST*	5/11/2019			2026

3760	WESTCHESTER VILLAGE APARTMENTS NORTH*	7/11/2019			2026
3050	WHITE PINES II	2/9/2008	6/24/2016		2026
3252	ALPINE ALTEN ZIMMER APARTMENTS	9/1/2010	5/8/2017		2027
1016	AMERICAN HOUSE NORTH	5/4/2003	11/7/2017		2027
925	AVERY SQUARE	3/2/1998	3/8/2017		2027
3166	BAY POINTE APTS	2/4/2008	10/2/2017		2027
920	BENJAMIN MANOR	8/3/2013	5/25/2017		2027
577	BIRCHWOOD MEADOWS	11/30/2010	1/23/2017		2027
832	BROOKWOOD APTS.	3/24/1992	7/25/2017		2027
280	BUENA VISTA/GLENDALE	3/31/1975	4/10/2017		2027
3083	CAMBRIDGE WOODS	8/28/2009	7/24/2017		2027
658	CAMELOT HILLS	12/1/2020	10/22/2021		2027
863	CHENE PARK COMMONS	1/31/1993	6/19/2017		2027
842	CIRCLE DRIVE APTS.	1/4/1992	4/27/2017		2027
888	CIRCLE DRIVE II	10/30/1993	4/27/2017		2027
1020	COASTAL CROSSING	2/5/2003	6/6/2017		2027
893	COLONIAL MEADOWS	1/0/1900	5/8/2017		2027
823	CRYSTAL LAKE APTS	4/8/1990	7/5/2017		2027
1031	EMERALD CREEK	5/27/2003	5/22/2017		2027
3042	ERWIN ESTATES	6/21/2008	1/20/2017		2027
3811	EVERGREEN NORTH*	3/1/2020	10/2/2021		2027
3812	EVERGREEN SOUTH*	3/1/2020	10/1/2021		2027
341	FRIENDSHIP MANOR	6/4/2020	10/2/2021		2027
3832	GENESIS VILLAS II	2/1/2020			2027
574	GREENTREE APARTMENTS	6/29/2010	3/23/2017		2027
1012	HARBOUR POINTE	4/1/2003	3/27/2017		2027
735	HIDDEN PINES/BONNIE BROOK	12/14/1987	8/10/2017		2027
1021	HILLSIDE CLUB APTSII	1/3/2003	11/28/2017		2027
1009	HORIZON POINTE	8/30/2002	8/10/2017		2027
699	JEFFERSON ST SQUARE	3/22/2002	5/1/2017		2027
3008	KINGSTON PLACE	12/19/2009	7/24/2017		2027
3801	LABELLE TOWERS*	5/14/2020	10/20/2021		2027
663	LAWRENCE PARK	4/20/2006	9/18/2017		2027
3039	LEXINGTON SQUARE APARTMENTS	12/2/2007	5/9/2017		2027
507	LONGFELLOW TOWER	4/14/2011	6/6/2017		2027
3180	MAPLEWOOD MANOR SENIOR HOUSING	7/31/2009	10/2/2017		2027
1045	MARSH RIDGE III	8/13/2020	7/7/2022		2027
1005	MEADOWVIEW GARDENS (AKA LOCKWOOD OF BURTON)	11/12/2002	3/3/2017		2027

3275	MEDICAL CENTER FAMILY	12/21/2010	7/5/2017		2027
302	MEDICAL CTR VILLAGE	12/21/2010	6/19/2017		2027
1018	MISTY COVE APTS.	12/22/2002	6/19/2017		2027
3428	OAKLAND PARK TOWER*	2/28/2020			2027
3007	OLIVER GARDENS	2/11/2008	5/8/2017		2027
944	PALMER COURT	12/26/2002	9/27/2017		2027
488	PARK FOREST	2/22/2020	10/2/2021		2027
798	PRINCE HALL PLACE	8/17/1990	8/23/2017		2027
1019	RIETZ PARK	12/17/2002	8/10/2017		2027
608	RIVERSIDE TOWNHOUSES	8/16/2011	7/6/2017		2027
432	RIVERVIEW TOWER	9/15/2020	10/20/2021		2027
444	ROBERTS III	10/31/2020	None		2027
1022	ROSEWOOD PARK	3/17/2003	7/5/2017		2027
3109	SAW MILL ESTATES (FAMILY)	1/20/2009	3/30/2017		2027
3052	SAWMILL ESTATES SENIOR	4/20/2009	4/3/2017		2027
961	SILVER STONE	6/25/2000	4/6/2017		2027
3056	SUNRISE VILLAGE SENIOR	4/30/2008	5/9/2017		2027
1033	VALLEY VIEW III	12/1/2003	1/20/2017		2027
3758	VILLAGE AT ROSY MOUND	1/19/2020			2027
3047	VILLAGE OF SPRING MEADOWS	11/29/2008	3/17/2017		2027
37	WELLS VILLA APARTMENTS	8/29/2003	5/4/2017		2027
3795	WEST HIGHLAND APARTMENTS*	1/12/2020			2027