



REQUEST FOR PROPOSALS

DATE OF ISSUE: August 25, 2025

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for development of Michigan’s second, 5-year Statewide Housing Plan**

Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	September 10, 2025	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	September 15, 2025	
Proposal deadline:	September 30, 2025	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	January 1, 2026	

I. Services Sought by Authority

The Michigan State Housing Development Authority (“Authority”) is seeking an organization authorized to do business in Michigan to work with the Authority to complete a second, five-year Statewide Housing Plan (“SHP”). The Authority is issuing a Request for Proposals (“RFP”) to obtain responses from qualified organizations to provide research and data analysis, conduct outreach and engagement, and draft the next SHP for Michigan. This work will involve a complex, multi-stakeholder timeline and project structure to create a statewide plan with key performance indicators and an implementation plan.

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

It is anticipated that an 18-month contract may be awarded.

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

II. Contents of this RFP

- Overview of services, 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 lack of housing in Michigan is a barrier to economic development growth and prosperity, a strain on household finances, and in many cases, results in too many families struggling to afford basic necessities. It is vital to develop strategies that strengthen neighborhoods and communities grappling with gaps and disparities within Michigan’s housing continuum. Michigan’s housing continuum cuts across four major segments: 1) emergency shelter, 2) permanent supportive housing, 3) rental housing, and 4) owner-occupied housing. Many low-income families struggle to find affordable housing, and homelessness is becoming more widespread and significantly impacting marginalized communities. This built housing environment continuum includes a need for new construction and rehabilitation; housing access and opportunity for all populations and household types; and housing needs across all geographies, from urban to rural to tribal.

The Authority understands that addressing the attainable (80-120% area median income or AMI) and affordable (less than 80% AMI) housing crisis in Michigan is a complex task and recognizes the need to integrate efforts of many partners (e.g., housing developers, homeless service providers, lenders, municipalities, state and federal agencies, non-profit organizations, those with lived experience, and health and human services agencies). Opportunity gaps exist along the lines of income and economic status, race and ethnicity, sexual orientation, language, culture, geography, etc. The planning process should allow for a focus on eliminating disparities and supporting solutions so that all people have access to safe, decent, and affordable housing. To inform this work, the process should also provide historical context on housing patterns in Michigan, including past policies and practices’ connection to present-day housing challenges and opportunities.

The first SHP was enacted in 2022 and ends in June 2027. The next SHP will be a reliable reference and messaging tool for policymakers, affordable housing providers, local governments, advocates, and many others. In addition to being a statewide plan, it is intended to be a guiding document and implementation tool for the Authority to set annual goals and measurable outcomes, based on the policy direction set forth in the plan. The Authority will utilize the information gathered from community outreach and engagement efforts related to housing needs to also inform the State of Michigan’s Consolidated Plan.

The first SHP resulted in [establishing an advisory body, the Michigan Statewide Housing Partnership](#) and fifteen [Regional Housing Partnerships](#) (RHPs) led by organizations local to each region. One of the RHPs’ main objectives is to build a collaborative, connected, and inclusive housing ecosystem which then works to create their regional action plans connected to the SHP and to assist with implementing their plans.

The Authority intends to release a final version of the plan by July 1, 2027.

IV. Objective

Create the second five-year SHP for Michigan.

- A. The firm selected will be responsible for conducting research and outreach through community engagement across the state to inform the plan. These steps may include to:
 - 1. Consult other statewide housing plans across the country to learn best practices for plan structure and process.
 - 2. Denote policies and incentives that impact the development and preservation of affordable housing and the delivery of services to households that experience or are at risk of experiencing homelessness in Michigan, including other statewide and regionally relevant plans.
 - 3. Consider the Authority's [vision, mission, guiding principles, and strategic focus areas](#) throughout the process.
 - 4. Conduct and work with existing data analysis and data sources relevant for housing policies and programming, to identify gaps, disparities, needs, and priorities across the state.
 - 5. Provide community outreach through a variety of stakeholders and across many methods (e.g., interview, survey, public meetings, etc.) to supplement the data analysis in identifying gaps, disparities, needs, and priorities.
 - 6. Incorporate both qualitative and quantitative research, using an evidence-based approach and extensive community outreach for setting priorities and goals for a plan, including the collection of lived experiences (e.g., through focus groups, listening sessions, and storytelling), to ensure community voices are reflected alongside the data.
- B. The firm will be responsible for working with Authority staff, in drafting, editing, and formatting the SHP document. The final document must be fully accessible in accordance with WCAG 2.1, Level AA.
- C. The plan may include, but is not limited to, the following components:
 - 1. A housing trends section that describes both current trends and a five-year projection of housing conditions in Michigan for an array of income levels and populations, written based on a majority of data generation and analysis provided by the Authority.
 - 2. Details about the research and outreach process in making the plan.
 - 3. Qualitative deliverables that highlight the experiences of households across Michigan's housing continuum (e.g., a summary report of lived experiences, community spotlights, and storytelling integration).
 - 4. Outlined and defined housing priorities, and goals for each priority. This is the bulk of the document and is informed by previous steps.
 - 5. A thorough implementation plan including overarching benchmarks or milestones, key performance indicators (KPIs), actors involved, timing, and resources pertinent to the goals. This may be a static document but, preferably, the vendor shall also provide a dynamic, user-friendly on-line interface version to easily collect, compile, and organize ongoing updates to the plan (e.g., with a data dashboard).
 - 6. Documentation, which may include a glossary, an index, additional data, acronyms and initialisms, citations or end notes, context-oriented appendices, etc.

Tasks

A. Project Management Plan:

1. Initial meeting with the Authority.
2. Develop work plan timeline, including all key components listed in items 3-6. This should include regular meetings with Authority staff (e.g., monthly) and with an Authority-appointed steering committee (e.g., quarterly).
3. The selected firm is directed to review the following reports to ensure their content and priorities are connected to the plan:
 - i. [Michigan Statewide Housing Needs Assessment](#) - 2024
 - ii. The Authority's [2024 Production Report](#)
 - iii. [Michigan's Campaign to End Homelessness State Action Plan](#)
 - iv. [ALICE annual report](#)
 - v. [Michigan Poverty Taskforce Report](#)
 - vi. [Statewide 3-year Aging Plan](#)
 - vii. Office of Rural Prosperity's "[Roadmap to Prosperity](#)"
 - viii. Michigan's [Healthy Climate Plan](#)
 - ix. [Michigan Infrastructure Council's 30-year Strategy](#)
 - x. Michigan Civil Rights Department [Fair Housing Report](#)
 - xi. Regional Housing Partnership-led housing needs assessments (to be provided at a later date)
 - xii. and other pertinent information.
4. Development of Outreach and Engagement Strategy
 - i. Develop materials and conduct some or all in-person meetings, such as regional town halls, in conjunction with Authority staff and other key stakeholders. These materials should address concepts around intersections with housing (e.g., eviction courts/legal system, justice involved/veterans, health care, educational institutions, local Fair Housing Centers, etc.).
 - ii. Provide a web-based tool to disseminate and collect information that will be available for all the outreach events. This may include a public-oriented survey.
 - iii. Consolidate and aggregate findings, from all outreach activities, including from events the firm does not host, to inform the plan.
 - iv. Engage and present to other decision-making bodies, such as an interagency committee, a steering committee, and the Statewide Housing Partnership.
 - v. Responsible for logistics and material content for diverse audiences, complying with ADA accessibility and State of Michigan language access requirements.
5. Analyze and consolidate all data and information gathered from the planning documents listed above, results from the outreach and engagement, and any other pertinent information needed to create the SHP.

Deliverables

- A workplan and timeline from contract execution to delivery of final product.
- Outreach and engagement strategy, including related materials and tools.
- The second 5-year SHP for Michigan, including an executive summary and an implementation component.

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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 this 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 this RFP, any supplements or revisions to this 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 Division at:
<https://www.michigan.gov/lara/bureau-list/cscl/corps>

- 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 Section 15.243 et seq.* Please note that any requests by non-Authority personnel to review proposals will be denied until the deadline for submission of the bids has expired. See *MCL Section 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 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. See the [Michigan GDBE Website](#).

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 and Section 18.1261*.

G. Submissions Subsequent to Award. As part of an awarded contract, the selected contractor may 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 **September 10, 2025**, at **4 p.m.** Eastern Time (Detroit). Submissions received at 4:01 p.m. are considered late and will not be considered further.

Responses to properly submitted questions will be posted on or around **September 15, 2025**. The Authority will hold no other question sessions or bidder's conferences.

B. Delivery of Proposal. Address questions using the subject line **5-year Statewide Housing Plan** 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 **September 30, 2025, at 4 p.m.** Eastern Time (Detroit). Submissions received at 4:01 p.m. are considered late and will not be considered further.
- 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:

Experience (up to 10 points)

- 1) Prior Experience of Bidder. Indicate prior experience of your organization that you consider relevant to the successful accomplishment of a statewide housing plan, as described in this RFP, including housing experience. Provide documentation that shows at least 5 years or 2-3 projects of relevant experience.
 - a. Include sufficient details to demonstrate the relevant experience.
 - b. Include narratives of qualifying experience, including project descriptions, costs, and start/end dates of projects successfully completed.
 - c. Include relevant experience working with diverse populations and people with lived experience.
 - d. Include samples of housing plans, project workplans with timelines, outreach and engagement strategy documents, public outreach materials with infographics, and research analysis created by your firm.
 - e. Include the name, address, and telephone number of the official responsible for 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 the work of personnel.
- 3) Professional References. Include professional references who can provide information regarding the bidder’s prior past performance.

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

Adequacy of proposed structure, staffing, and time frames for performing services (up to 10 Points)

- 1) Description of methodology. Explain how your organization will manage the varying tasks to create a final product. Provide estimates of staff numbers and staff time needed to complete the project by July 2027. Describe how the Authority, its partners, and other stakeholders will be included throughout the project.
- 2) Sample timeline. Please provide a sample timeline showing the plan components and key actors for the project's duration.

Research and data analysis proposal (up to 15 Points)

- 1) Description of methodology. Describe how data will be retrieved, analyzed, and considered in preparation for community engagement and outreach. List any sources that may be important to consider, software and skillsets used for analysis, and what deliverables will guide the next phase of the project.

Communication, engagement, and outreach skills (up to 25 Points)

- 1) Description of methodology. Describe how community engagement and outreach will be conducted, to maximize input across the state and demographics.
- 2) Provide a list of tools, skills, and materials your organization may be able to use for this engagement and outreach.

Plan components proposal (up to 40 Points)

- 1) Narrative of strategy. Describe how your organization will compile information from the research and outreach stages to draft a statewide housing plan.
- 2) Provide examples of similar planning work that will inform your strategy.
- 3) Explain how the plan will be formatted and how its different components will relate to one another.

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.

Use of Subcontractors. If any work is 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.

Standards. Describe how you will monitor and ensure quality of process.

*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. If applicable, the Authority's evaluation will include consideration of a bidder's qualified disabled veterans/service-disabled veteran owned business (QDV/SDVOB) status under [MCL 18.1261\(8\)](#). Additional information on the SDVOB preference is available at: [Michigan.gov/SDVOB](#).

The Authority may but is not required to conduct an on-site visit to tour and inspect the bidder's facilities; require an oral presentation of the bidder's proposal; conduct interviews, research, reference checks, and background checks; and request additional price concessions at any point during the evaluation process.

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 November 12, 2025, 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:

- Refusal of Department of Civil Service to process required forms.
- Refusal of duly authorized Authority signatory to execute the contract.
- Unavailability of Authority or Federal funds for the purposes of this RFP.

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

EXHIBIT C

PROPOSAL FORMAT

I. Overview

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

II. Headers and Contents

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

A. Company Background Information.

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

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

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

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

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

C. Experience.

1. **Prior Experience of Bidder.** Indicate prior experience of your organization that you consider relevant to the successful accomplishment of the project described in this RFP.
 - a. Include sufficient detail to demonstrate the relevance of such experience.
 - b. Include descriptions of qualifying experience, including project descriptions, costs, and start/end dates of projects successfully completed.
 - c. Include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
 - d. The Authority 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 to guide a long-term, strategic plan, especially related to housing.
 - ii. Experience with research, data analysis, and state/federal-level housing resources.
 - iii. Experience in community outreach to inform a strategic plan, especially using modern technology, such as web-based tools.
 - iv. Experience in aggregating various sources of information to determine the plan's structure, priorities, and content.
 - v. Experience establishing key performance indicators and an implementation plan.
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. Documentation of five years of experience and/or 2-3 projects successfully completed, similar to the scope of a statewide housing plan.

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 any and all products produced as a result of an awarded 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.

6. Compliance of Materials. Acknowledge and/or confirm the following:

- a. You agree that any and all products produced as a result of an awarded contract shall be created in or made available in an accessible format that complies with Title II of the Americans with Disabilities Act of 1990, as amended, and State of Michigan digital standards.
- b. While desired but not mandatory, the proposal and related documents responding to this RFP be created in or made available in an accessible format.
- c. The Authority follows standards set by the State of Michigan. Further information can be found here: <https://www.michigan.gov/som/digitalstandards>

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/services/travel>

By submitting the bid, the Bidder acknowledges that it bears the risk that its expenses may exceed the proposed amount.

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

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

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

Include a timetable indicating how the project will be scheduled.

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

G. Disclosures.

1. Interests in Authority Programs. Authority programs include, but are not limited to, the Housing Voucher Program, any loans where the Authority is the lender, and any grants made by or administered by the Authority.

a. Does the Bidder, its officers, board members, and employees respectively, have any interests in Authority programs?

(Yes / No)

If Yes, please provide their name, title, and the Authority program for which the interests exist.

b. If the Bidder intends to use independent contractors or subcontractors to render services, do the independent contractors or subcontractors and their officers, board members, and employees respectively, have any interests in Authority programs?

(Yes / No)

If Yes, please provide their name, title, and the Authority program for which the interests exist.

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

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

(Yes / No)

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

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

(Yes / No)

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

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

3. Family Members Who Work for Authority.

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

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

I confirm that I have submitted this proposal on behalf of

_____ in response to the
**Michigan State Housing Development Authority's Request for Proposals for
5-year Statewide Housing Plan.**

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

By: _____

Its: _____

Date: _____

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

EXHIBIT D

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)