



REQUEST FOR PROPOSALS

DATE OF ISSUE: September 30, 2021

TO: Potential Providers of Services

RE: **Request for Proposals (“RFP”) for Senior Housing Study**

Quick Reference

	Date	Time
Deadline to submit questions about this RFP:	October 12, 2021	4 PM Eastern (Detroit, MI)
Anticipated date Authority will post answers to questions:	October 19, 2021	
Proposal deadline:	November 15, 2021	4 PM Eastern (Detroit, MI)
Anticipated contract begin date:	January 3, 2022	

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

I. Services Sought by Authority

The Michigan State Housing Development Authority (“Authority” or “MSHDA”) is seeking an organization authorized to do business in Michigan to provide a Senior Housing Study.

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 sixteen month contract may be awarded.

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
- Exhibit E – Market Study Analysis Questions - Addendum

III. Overview

MSHDA's Office of Market Research (OMR) in MSHDA is a small unit that provides affordable housing research to Authority staff and external stakeholders, as well as determining the market feasibility of specific multifamily housing developments. The OMR is seeking a firm to conduct a study of senior housing in Michigan with an emphasis on ways to meet the current and future needs for affordable housing. The OMR has already conducted some of its own research, and it indicates a substantial shortage of affordable housing for seniors. This problem will certainly worsen as the baby boomers continue to age and the already inadequate supply of appropriate housing fails to keep pace. The core research question is: What are the obstacles to creating a sufficient supply of safe and appropriate affordable housing for seniors in Michigan and how might they be overcome?

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

MSHDA's previous research on this topic focused primarily on the current demand, supply, and affordability of senior housing in Michigan. Please note that in order to avoid duplicating our previous work, the study OMR is seeking should draw when feasible on the data/analysis already available, while providing additional research and analysis as necessary to fulfill the Scope of Work. To view this previous research, please go to www.Michigan.gov/HousingResearch and see the Michigan Statewide Housing Needs Assessment and the Michigan Homeownership Study.

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: Bidders are encouraged to revise this Scope of Work in their proposals, briefly explaining the reasoning behind any major modifications. OMR is also asking for an additional piece of research to be submitted separately from the main body of the report (in an addendum or a separate document) which addresses some specific questions (See Exhibit E) OMR has pertaining to our multifamily market study reviews.

Please note that OMR would like this research to address the need for a broad spectrum of senior housing, including senior-appropriate homeownership and rentals ranging from independent living apartments to apartments offering services. ("Senior services" as used in this RFP include things like meals, housekeeping and laundry services, medication management, and help with activities of daily living.) However, OMR is not seeking information about nursing homes or other medical facilities, unless it is somehow germane to senior housing.

The research should focus on senior housing that is affordable to low-and middle-income households. However, to the extent that market-rate housing impacts or explains the

markets for affordable options, please include it. (MSHDA often funds housing with a combination of affordable and market-rate units.) OMR is further interested in an examination of seniors by age group, as younger seniors tend to have different housing, accommodation, and service needs than older seniors. One option may be to use the following categories: Near Seniors (aged 55-64), Young Seniors (65-74), Middle Seniors (75-84), Oldest Seniors (85+ years). Bidders may choose whether to use these categories. Finally, when OMR refers to “safe” or “appropriate” housing, it means housing which has the layouts, amenities, accessibility, and safety features (grab bars, etc.), and other characteristics to allow seniors to age in place safely and comfortably.

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

1. **Demographics.** Major trends and conditions in the numbers of Michigan’s senior households, such as current/future household distribution by age group, seniors as a percentage of the state’s population and households, etc. Significant patterns pertaining to Michigan seniors by racial group, gender, and other underserved groups included in MSHDA’s Guiding Principles (https://www.michigan.gov/mshda/0,4641,7-141-7559_46718---,00.html). Provide five and ten-year projections of major demographic trends that might impact the need for or availability of affordable senior housing in the future.
2. **Economic factors.** Major trends and conditions in income levels, income sources (pensions, Social Security, 401k, etc.), household costs (relative spending on food, housing, medical care, for example), and the employment status of seniors by age category. Projections of the major economic trends that might impact housing availability/affordability into the future. How do the factors differ for underserved populations?
3. **Housing data.** Present data/information that can paint a picture of the overall current housing situation for Michigan seniors, including the tenure (the distribution of renters and owners) and tenure changes (owners moving to rentals, etc.). Please discuss how housing situations vary by seniors’ racial group, gender, and other category of underserved population. At a minimum, please provide the following of information to the extent that data is available:
 - a. **Renters.** Gross rent as a percentage of income, movership rates, availability of services, percentages living in age-restricted and non-age restricted rentals.
 - b. **Homeowners.** Housing costs as a percentage of income for mortgaged and non-mortgaged households, movership rates, average value of owner-occupied homes, rehabilitation needs, needs for aging accommodations (wheel-chair ramps, grab bars, first-floor living, etc.).

- c. **Unmet Need.** An estimate of unmet need for affordable senior housing of all types now and projected 5 and 10 years into the future. Break unmet need down by age category. OMR is looking for a general idea of the amount unmet need; rough estimates of need levels or ranges of need will be sufficient. MSHDA's previous research may be of help with this section.
- d. **Rural Households.** The major demographic, economic, and housing indicators above, plus any others that the research firm deems important. Compare the data for rural households with those of urban and suburban households.

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

There are no commonly agreed upon definitions of different types of senior rental housing in Michigan; therefore, bidders should clearly define each type. Bidders may, but are not required to, use the following categories, which MSHDA has used in the past: independent living, congregate care (if distinguished from "assisted living"), MSHDA Congregate Care, assisted living, and continuing care retirement communities ("CCRCs"). (MSHDA funds a model of senior housing called "Congregate Care." These properties are age-restricted to households ages 55+ and offer a-la-carte 1 or more meals per day plus housekeeping services. These properties also offer transportation, which is included in the rent. Residents pay a higher monthly rent, exclusive of a-la-carte services, than would be paid for a comparable rental that did not offer any optional services.) For each category of rental housing in the report, please address the items below, noting any instances where data is not available. It may be helpful to contact a sample of different types of properties to gather some of the requested information.

1. Rental Housing. Please provide the following information about senior rentals:

- a. Describe each category of senior housing and discuss the typical target market or tenant profile that it might attract (younger, active seniors, or older seniors in need of daily assistance, for example, and income levels.) What is known about the average age of a resident in different categories of rental housing?
- b. For each type, approximate the number of properties and units in Michigan, and discuss their geographic distribution.
- c. What are the typical price ranges for rent, services, and any other major costs for the different product types?
- d. Discuss the typical renter costs (including any service costs) for the tenants of each model of housing. Discuss the affordability of each type to low-income and middle-income households.
- e. What are the prominent trends in each category that might help inform a discussion of the future adequacy of supply, demand, and affordability?
- f. Discuss and quantify (if possible) the degree to which the supply of each rental type is sufficient to meet the future need. What types are in the greatest need now? In the next 5 years? 10 years? Specifically address

- the upcoming need for affordable housing with services, in light of the aging of the Baby Boom generation.
- g. Discuss the types of locations in which senior housing with services tend to be developed and their prevalence in low-income areas.
 - h. What features and amenities do seniors seek most, and how well does the existing housing meet the market demand?
 - i. Discuss how housing need might be impacted for seniors who need support service for activities of daily living and for dementia patients? How common is the need for such services? How do these services impact the cost of housing?
 - j. OMR knows that many senior renters live in apartments that are not age-restricted to older households. What does existing research tell us about the numbers of seniors living in non-senior rentals? Approximately how many do so? Do they do so for lack of age-restricted options? What is known about the prevalence of seniors aging-in-place in non-senior apartments? Are their needs for services being met? If so, how?
 - k. Looking at existing MSHDA housing, what is the breakdown between senior and non-senior housing? Looking at tax credit applications for the past three years, what has been the breakdown between senior and non-senior proposals? In the past 10 years, how many new senior rental units as the Authority financed? How has the mix of MSHDA senior vs. family (non-age-restricted) housing changed?
 - l. Do recent growth trends in the number affordable and market rate rental units favor family (non-age-restricted) housing, senior housing, or neither. If current trends continue, what impact on the availability of affordable and market-rate senior might be expect?

2. Senior Homeownership Issues. Many seniors choose to stay in their homes as they age or do so by necessity. OMR would like to get a better understanding of their living situations and the degree to which current and future homeowners may age safely, appropriately, and affordably in their own homes.

- a. **Home Maintenance and Repair Needs.** Discuss and quantify (if possible) the repair/rehabilitation needs that may have accumulated in seniors' homes over the years and how this may impact their ability to sell or live safely at home. Address the impact of Michigan's aging housing stock on the need for and affordability of maintaining these homes. (MSHDA's *Michigan Homeownership Study* found at https://www.michigan.gov/mshda/0,4641,7-141-5587_82313---,00.html may some have information useful for this section.)
- b. **Home Accommodation/Safety Issues.** Address the following:
 - i. Explore the design elements and home accommodations that senior homeowners generally need to allow for safe and comfortable aging in place. Some examples include first-floor bedrooms and laundry, wheelchair ramps, elimination of tripping hazards, addition of

appropriate lighting, Personal Emergency Response Systems (PERS), home security improvements, technological aids, and other important or innovative accommodations.

- ii. Describe the unmet need for aging-in-place home accommodations among Michigan senior homeowners. What financial options do seniors have to make such accommodations when they cannot afford to pay out-of-pocket? How many senior homes already have aging-in-place features? Provide cost estimates for retrofitting a home with these adaptations.
3. **Homelessness.** Discuss the incidence of homelessness among Michigan seniors. (MSHDA staff may be able to help obtain this data.)
4. **Home Care.** Please provide a brief discussion of the major issues and challenges involved with seniors bringing home-based care into their own single-family residences to address the need for services. What are the major challenges, advantages and disadvantages of doing so? Discuss the affordability of this option and compare it to the typical affordability level of an assisted living facility.
5. **Family Care.** What is known about the incidence of seniors in Michigan living with family members due to a lack of affordable housing options? What challenges are faced by family members of caring for a senior who needs direct care such as assistance with activities of daily living or dementia care? What is known about the adequacy of the care received by such seniors? What percentage of the state's population can afford to pay for a typically priced assisted-living facility? How has the affordability of assisted living changed over the past 5 and 10 years?
6. **Rural Senior Housing.** OMR would like a better understand of the unique housing challenges faced by seniors in rural communities. Please address the following at a minimum:
 - i. To the extent that data exists, discuss the unmet need for the following among rural seniors and compare it to that of urban and suburban areas:
 - o General home maintenance and repair
 - o Accommodations to allow aging-in-place in one's own home
 - o In-home health care/home health aides
 - ii. Discuss the most important demographic, economic, and housing trends related to rural senior housing. Are rural seniors staying in owner-occupied homes at rates greater or less than non-rural areas? When renting, are they living in senior or non-senior rentals? Living with family? Other?
 - iii. Include, if available, data on the cost and availability of the different types of senior rental housing in rural areas compared to urban and suburban areas. How common are rural assisted living facilities? Independent living apartments? What trends are seen in the prevalent types of housing in rural areas?

- iv. Estimate the unmet need for affordable age-restricted rental housing among seniors in rural areas, compare it to urban and suburban areas, and discuss the likely reasons for any differences.
- v. Discuss how the small community size that inhibits economies of scale may impact the development of rural senior housing. Also address whether physical isolation from amenities and services (such as social services and health care) impact the provision of service-assisted housing.

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

1. Senior Rental Housing. Describe how problems related to rental markets (demand, supply, demographics, **economic** factors) might be problematic. Include:

- a. **Cost of Building and Operating Housing.** The role of cost factors (such as building costs of land, labor, and materials, and operating costs such as management, universal design, or other factors) in providing affordable senior housing.
- b. **Services.** The costs, challenges, and risks related to the provision of senior services: service delivery challenges, labor issues, financing issues (particularly given that not all lenders will underwrite service costs), liability risks, others.
- c. **Senior Rentals and Tax Credits.** This discussion should address the obstacles that developers may face when attempting to develop affordable senior housing with Low-Income Housing Tax Credits. Please address senior housing with and without services separately. At a minimum, please address the following:
 - i. The degree of local government support for affordable rental housing, including the willingness to grant tax abatement via Payments in Lieu of Taxes (PILOTs).
 - ii. Issues pertaining to social inequities experiences by underserved populations. Discuss the degree to which so-called “NIMBYism” plays a role in in local support for affordable senior housing.
 - iii. What local zoning and other regulatory barriers exist?
 - iv. What are the major obstacles that developers face when they seek to develop affordable senior properties with MSHDA funding? Address any impediments posed by the Authority’s Qualified Allocation Plan

(QAP), including the LIHTC point scoring or set asides, or other MSHDA policies and procedures.

- v. What are the major obstacles that developers face when they seek to develop affordable assisted living properties in Michigan under MSHDA's existing Affordable Assisted Living program?
 - vi. What types of impediments do seniors face when trying to find and pay for a senior rental? How might this experience differ for underserved populations? How do these impediments differ for younger seniors compared to older seniors?
- d. **Market-Rate Rental Development.** What are the major challenges (market factors, cost structures, or financing obstacles, for example) when developing market-rate (non-tax credit assisted) senior housing with and without services?

2. Senior Homeownership.

- a. What obstacles do homeowners face to adapting their owner-occupied homes for aging-in-place?
- b. Discuss MSHDA rehabilitation loans as they pertain to rehabilitating/adapting homes for aging-in-place. What challenges do homeowners encounter when they seek such a loan?
- c. Discuss the challenges seniors might face to selling their homes when they need to relocate to a more appropriate setting. Address the impact of deferred maintenance that may have accumulated over the years. (MSHDA's *Michigan Homeownership Study* provides information useful for this issue.)
- d. Explain the dilemma that homeowners in declining neighborhoods face, when they may have had difficulty building equity in their homes over time or may have negative equity. Discuss the obstacles that such a household might face when try to secure affordable senior housing that meets their needs.

3. Rural Areas. Please discuss any unique impediments (financial or otherwise) to developing and operating senior rental housing with and without services in rural areas where economies of scale may be lacking. How have currently existing assisted housing in rural overcome this issue?

4. Systemic Obstacles. Discuss systemic, societal, cultural, economic, and other macro forces that may help explain the lack of sufficient affordable senior housing. Specifically address the degree of willingness to spend public resources for senior housing and housing with services. Discuss the possible costs to individuals, families, health care systems, social services systems, and other facets of society of not providing adequate safe and affordable senior housing.

E. Action Steps. This section should provide the Authority with a toolbox of potential action steps which could be taken to lessen unmet senior housing demand. OMR is not looking for definitive recommendations for MSHDA to take, but rather is looking for a range of options which the Authority can consider.

As part of this effort, OMR would like the research firm to examine notable programs/efforts made by affordable housing organizations across the nation. For any policies, programs, or procedures that the research firm feels might be beneficial in Michigan, discuss the benefits and obstacles related to implementing the action, and provide a general description of the processes and resources required to implement it. Also, please address the specific questions below.

1. How can MSHDA help to increase the supply of different types of affordable rental housing (independent living, congregate, assisted living, etc.)?
2. Are there any pots of funds that MSHDA has overlooked which could augment either its rental or homeownership programs to help increase the supply of senior housing?
3. How could MSHDA better incentivize senior rental housing development through the QAP and other program parameters?
4. How can MSHDA improve the equitable distribution of affordable senior housing among households regardless of race, gender, or other category of underserved population? How can MSHDA ensure that low-income areas are better served?
5. Are there any notable new rental housing models for seniors emerging in the affordable arena?
6. How can MSHDA modify its existing Affordable Assisted Living program to increase the supply of affordable assisted living facilities in Michigan? How can Medicaid waivers best be used to facilitate this type of development? Are there any sources of funding that have been overlooked? Please explore one or two existing programs used by other housing agencies in the Great Lakes region that have successfully paired Medicaid waivers with assisted living. What can MSHDA learn from their experience?
7. What strategies might MSHDA consider in order to increase the supply of affordable rentals in rural areas? If the bidder deems it is useful, provide examples/case studies of ways that the obstacles providing senior housing with services in rural areas have been overcome.
8. How can senior services, safety modifications, and other aging-in place mechanisms be provided to seniors in existing affordable senior rentals to prevent the need for residents to relocate to more service-intensive rentals?
9. How could MSHDA's homeownership program better help seniors to adopt the physical accommodations necessary to age in place?

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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 12, 2021** 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 19, 2021**. The Authority will hold no other question sessions or bidder's conferences.

B. Delivery of Proposal. Address questions using the subject line **Senior Housing Study** to:

Kellyj11@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 15, 2021 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:

Kellyj11@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.	Skills and Experience: Experience in collecting, analyzing and explaining housing, economic, demographic, or other public data to provide objective policy analysis. Such knowledge/experience specific to senior citizens is beneficial, but not required for contractors, as it may be provided via subcontractors. Also, the skills and experience of both project manager(s) and supporting staff will be considered.	40
2.	Project Management: Degree of experience in successfully managing projects of similar size and scope to the one proposed.	20
3.	Communication skills: We will assess the following attributes of the proposal and any other written communications: organizational skills, quality/clarity of writing, the ability to follow the requirements in the RFP, attention to detail, and completeness.	20
4.	Project feasibility: The degree to which the proposed methodology, staffing, and time frames for performing services are likely to meet the needs of the project. Also, the reasonableness of the fee given the scope of work.	20
	Total Possible Points	100

Proposals receiving **80** or more technical evaluation points will have pricing evaluated and considered for award.

Note: The Authority will utilize all Bidder information to determine the best value for the services sought, and is not obligated to accept the lowest price proposal.

B. Proposal Selection. The Authority's review may take up to four weeks after the closing date for submitting proposals. The Authority anticipates notifying the selected contractor on or about **December 3, 2021** 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.

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**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 and years of relevant experience, 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 managing large research projects related to housing or other public policy issues
 - ii. Experience identifying, collecting, analyzing, and presenting a wide variety of data and using such data to create issue analyses or recommended action steps;
 - iii. Experience effectively communicating research findings to stakeholders with various levels of understanding of complex subject-matter, including writing reports and creating and giving presentations; Experience successfully working collaboratively on large projects.
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.** Please submit recent (within five years) examples of work you feel are relevant to the project described in this RFP. For example, these samples might include the following:

- a. Research reports related to affordable housing, issues related to the welfare of senior citizens, or other related topics.
 - b. Presentations pertaining to relevant topics.
 - c. Market studies or housing assessments pertaining to affordable housing, senior housing, or market-rate housing.
 - d. Any other documents that show experience and skills that could be effectively applied to the proposed project.
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 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:

- 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
the MSHDA Senior Housing Study, 2021**

**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)

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

EXHIBIT E

ADDENDUM: MARKET STUDY ANALYSIS QUESTIONS

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

1. Paying 30% of one’s income toward housing is generally considered to be “affordable”. But some feel that this percentage should be higher for seniors, since their non-housing costs are assumed to be lower than younger households. Is this true? What percentage of income should seniors pay towards housing in order to have enough left over for other expenses if they 1) live in an assisted living setting and must pay for services or 2) need Congregate Care services (under MSHDA’s Congregate Care model) or 3) live in an independent living setting without services?
2. What does existing research show about the extent to which family members subsidize their elderly parents’ incomes?
3. What is the composition of a typical senior budget by age group (what percentage of income is typically spent on housing, food, health care, leisure, other expenses, etc.), and how does it vary by the age category of the senior?
4. What are the typical costs of supportive services charged to residents in Michigan? What does a typical meal cost? Housekeeping services? Laundry services? Medication management? Other? How do these costs vary by geography?
5. Given that pricing in assisted living facilities is often based on different bundles of services, what models exist for comparing the total price (rent plus services) paid by residents when comparing different service-assisted rentals?
6. Discuss current trends in the preferences of seniors seeking multifamily rentals as they impact market preferences for unit sizes, amenity types, and other features. What product types, amenities, and features are growing or waning in popularity?