



GENESEE COUNTY PURCHASING DEPARTMENT

ROOM 200, COUNTY ADMINISTRATION BLDG.
1101 BEACH STREET
FLINT, MICHIGAN 48502

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ERIC F. HOPSON
Purchasing Director

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April 17, 2009

ADDENDUM #1

**REQUEST FOR PROPOSALS (RFP) #09-010
CONSULTANT SERVICES FOR A COMPREHENSIVE HOUSING STUDY FOR
AN AFFORDABLE ASSISTED SENIOR LIVING DEVELOPMENT**

1. Please included the attached minutes, questions, and answers as part of the above referenced RFP.

Indicate on the Signature Page item #5 and the exterior of the envelope containing your proposal:

“ADDENDUM #1 RECEIVED”

**ALL PROPOSALS MUST BE RECEIVED AT:
GENESEE COUNTY PURCHASING DEPARTMENT
1101 BEACH STREET, ROOM 200
FLINT, MI 48502**

Eric F. Hopson

Eric F. Hopson, Purchasing Director
G:/bid2/2009/09-010add1

**GENESEE COUNTY
RFP# 09-010 CONSULTANT SERVICES FOR A COMPREHENSIVE HOUSING
STUDY FOR AN AFFORDABLE ASSISTED SENIOR LIVING DEVELOPMENT
PRE-BID MEETING
ADMINISTRATION BUILDING – GCMPC CONFERENCE ROOM 2ND FL
MARCH 31, 2009 – 1:30 P.M.**

Companies in attendance:

Debra Gilbert, Eastside Senior Citizens Association
Kim Carlson, Flint Surveying & Engineering Co.
Freman Greer, GAV Associates
Joe Filippelli, Gazall Lewis
John Gazall, Gazall Lewis
Bryce Kelley, McKenna Associates
Jay Hall, Park McPherson Design & Construction, Inc.
Chantal Hart, NCB Capital Impact
Steve Sorensen, Professional Engineering Associates
Doug Piggott, Rowe Professional Services Co
Jackie Williams, Ted Hu Associates
David Boersma, THA Architects

The Senior Assisted Living RFP #09-010 Pre-proposal meeting began at approximately 1:35 p.m. on Tuesday, March 31, 2009. Mr. Eric Hopson, Purchasing Director introduced himself and the following GCMPC staff introduced themselves: Julie A. Hinterman, Director-Coordinator, Chris Durgan, Principal Planner and Terry Thomas, Associate Planner.

Mr. Hopson stated that sealed proposals must be submitted to the Genesee County Purchasing Department, 1101 Beach Street, Room 200, Flint, Michigan 48502, by 3:00 p.m., Thursday, April 23, 2009. **LATE PROPOSALS AND PROPSALS SENT BY FACSIMILE OR EMAIL WILL NOT BE ACCEPTED.** Also, Mr. Hopson indicated the deadline for submitting written questions was Monday, March 30, 2009. County staff will review the written questions submitted at the end of the meeting.

Mr. Hopson indicated that attending the pre-proposal meeting is not a requirement for submitting proposals. In addition, he indicated that each proposer is responsible for labeling the exterior of the sealed envelope containing the proposal response with the proposal number, proposal name, proposal due date and time, and the firm's name. Mr. Hopson distributed green proposal /bid stickers to all firms represented at the meeting. The stickers may be used for the purpose of complying with the requirements for labeling proposals.

Mr. Hopson stated the proposer must submit one original and ten (10) additional hard copies of the proposal. The original must include a signature on the

Signature Page of a person authorized to make a binding offer. Additionally, the proposal response must consist of one copy in electronic format on a CD formatted in Adobe (.pdf), Microsoft Word, and/or Microsoft Excel. All proposals become the property of Genesee County. Failure to provide the required number of duplicate copies may result in rejection of your proposal.

Mr. Hopson directed attention to the typo in Section 1, Item 4, which should read:

“To be considered for award, each offeror must submit a 2009 Certificate To Do Business With Genesee County. For further information on this requirement, contact the Genesee County Office of Equity and Diversity, 1101 Beach Street, Room 343, Flint, Michigan 48502. Telephone: (810) 257-3028, Fax: (810) 768-7943.

Mr. Hopson pointed out the County’s Standard Proposed Contract is attached to the RFP. He indicated the County’s Standard Proposed Contract would be used in developing a formal contract negotiated with the successful proposer(s). All firms are allowed to submit exceptions to terms and conditions in the RFP and standard proposed contract. However, exceptions must be submitted as specified in the RFP document.

Mr. Hopson directed attention to Page 7, Section 3, Questions & Inquiries: In preparing proposals, prospective offerors are advised to rely only upon the contents of this RFP and written clarifications (addenda) issued by Genesee County.

Mr. Hopson stated Item 5, page 8 Addenda: Genesee County reserves the right to amend and provide clarification of this RFP prior to the date for proposal submission. In such an event, an addendum will be posted on the Purchasing Department website (<http://www.co.genesee.mi.us/Purchasing/currentbids.htm>.) Further, all proposers shall acknowledge having seen any and all addenda issued (1,2,3, etc.) on the Signature Page.

Further, Mr. Hopson covered the following information from Section 3:

- **Responsive Proposals:** To be deemed responsive, all proposals should be submitted consistent with Section 7. Information Required From Proposers (Proposal Format). In addition, the Signature Page must be executed with the original containing an original signature of a Corporate Officer, Owner or authorized company representative.
- **Exceptions:** The proposer shall furnish a statement on company letterhead giving a complete description of all exceptions to the terms, conditions, and specifications set forth in this RFP and the Standard Proposed Contract. Failure to furnish this statement shall mean the proposer agrees to meet all requirements set forth in this solicitation.

- **Validity Period:** Any proposals submitted in response to RFP #09-010 shall be binding on the proposer for 120 calendar days following the due date of proposals.
- **Right to Reject:** Genesee County reserves the right to reject any and all proposals received in response to this RFP.
- **Clarification of Proposals:** Discussions may be conducted with responsible proposers who submit proposals determined to be reasonably susceptible of being selected for award for the purpose of clarification to assure full understanding of, and conformance to, the solicitation requirements. Prospective proposers may be required to make a presentation of their proposal. This opportunity would provide the proposer the ability to clarify its proposal to ensure mutual understanding of the services to be provided. Clarification of proposals is solely at the discretion of Genesee County.
- **Best and Final Offers (Negotiations):** In the event the County opts to pursue Best and Final Offers, the process will be handled consistent with Section 3.15. in the RFP.
- **Disclosure:** All information in an offeror's proposal is subject to disclosure under the provisions of Public Act N. 442 of 1976 known as the "Freedom of Information Act".
- **Contract Period:** The contract is for a period of ninety (90) days and may be renewed by the County and the GCMPC, in writing, for one (1) sixty (60) day period.
- **Contract Payment Schedule:** Payment for any contract entered into as a result of this RFP will be made within 30 days after the final report is accepted by the GCMPC and federal funds are received. The proposer is invited to propose an alternate payment schedule.
- **Contract Document:** The contract document will consist of the RFP, the proposal submitted by the successful proposer, any best and final offers, and a separate document (see Attachment #1 Genesee County Standard Proposed Contract) signed by the successful proposer and the County which will include any additional contractual requirements.

Mr. Hopson directed everyone's attention to page 12, Section 5, Item #5, **Ineligible Contractors:** All proposers will be required to certify that they are not on the Comptroller General's List of Ineligible Contractors. All proposers must also certify that any firm, partnership, or association in which they have substantial interest, personally or as a corporate entity, is also not included on the Comptroller General's List of Ineligible Contractors. The County will perform

due diligence activities to insure that the successful proposer is in compliance with this provision.

Mr. Hopson highlighted **Section 7. Information Required From Proposers (Proposal Format)** to underscore the importance of submitting responsive proposals that comply with this section. In the event proposals are submitted that do not comply with this section of the RFP, proposals may be deemed non-responsive and rejected.

Section 7. Information Required From Proposers (Proposal Format)

1. NON-RESPONSIVE PROPOSALS

Proposals may be judged non-responsive and removed from further consideration if any of the following occur:

- A. The proposal is not received in a timely manner in accordance with the terms of this RFP.
- B. The proposal does not follow the specified format as presented in this Section 7.
- C. The proposal is not adequate to allow a judgment by reviewers/evaluators.

2. RESPONSIVE PROPOSALS MUST INCLUDE AND/OR COMPLY WITH THE FOLLOWING:

- A. Copy of RFP #09-010, pages 1-30
- B. Proposal submitted by the due date and time.
- C. One (1) original and ten hard copies of the proposal.
- D. One (1) copy of the proposal in electronic format.
- E. Signed Signature Page. This document shall be properly executed as described in this RFP. All proposals received shall include this document for the County and GCMPC to consider a proposal as a formal and binding offer.
- F. Executed Bidder's Insurance Checklist. See Page 20 of RFP #09-010, for Bidder's Insurance Checklist. Must have both signatures on this document, the Insurance Agent's Signature and the Bidder's Signature.
- G. 2009 Certificate to Do Business with Genesee County. See Page 31 of RFP #09-010. If you do not have a Certificate at the time of proposal submission, include a letter indicating the date your company's equity and diversity plan was submitted to the Genesee County Office of Equity and Diversity for review. In addition, please include a copy of the submitted Model Equity & Diversity Plan.
- H. Statement of Exceptions. Stated exceptions to the RFP and/or Standard Proposed Contract as indicated in RFP #09-010, Section 3.11.

- I. Statement of Contractor Eligibility. A written statement that the proposer is not on the Comptroller General's List of Ineligible Contractors. All proposers must also certify that any firm, partnership, or association in which they have substantial interest, personally or as a corporate entity, is also not included on the Comptroller General's List of Ineligible Contractors.
- J. Demonstration of Financial Stability. Submit with the proposal your organization's most recent financial audit, annual compiled financial statements or annual consolidated financial statements.
- K. Technical Proposal (shall consist of the items stated below):
 - 1. Cover Letter – A letter indicating the interest of your firm that includes a list of staff members that would be engaged in the individual elements of this project. The letter should include a general description of the relevant kinds and types of overall projects your firm has the capacity to design and study. Also, the letter should indicate if your firm will be performing all services on this project, whether part of the work would be sublet or whether the overall project would be a joint venture between two or more firms. Additionally, the letter should indicate the anticipated timeline for completing the study and plan.
 - 2. Business Organization – State the full name and address of your organization and, if applicable, the branch office or other subordinate element that will perform or assist in performing the work. Indicate whether you operate as an individual, partnership or corporation; if as a corporation, include the state in which you are incorporated.
 - 3. Statement of the Project – State in precise terms your understanding of the project presented in this RFP.
 - 4. Management Summary – Include a narrative description of the proposed effort and of the product that will be delivered. Additionally, include a description of the planning approach and analysis strategy to be used by your firm.
 - 5. Work Plan – Describe in narrative form your technical plan for accomplishing the work. Include in the work plan the time frame or schedule your plan would adhere to. Indicate the number of labor hours you have allocated for each task including meetings (GCMPC required or community facilitation). All work must be completed with project deliverables submitted to the GCMPC by Monday, August 17, 2009.
 - 6. Prior Experience – Prior experience with similar activities is essential for any firm to provide the work/services which will satisfy the requirements of this RFP. This section shall consist of descriptions of qualify experience to include a minimum of four (4) references with project descriptions and

also the name, address and phone number of the responsible official of the client organization who may be contacted. Further, this information should not experience with housing studies and relevant work performed for other public entities and the contract price. Information should be provided about similar engagements that employed innovative strategies or techniques.

7. Labor Requirements – The successful proposer must be able to staff a project team, which is experienced in the development of housing studies. Include the number of staff by skill and qualifications that will be employed in the work. Identify key individuals by name and title. Please include resumes of individuals that will be engaged in performing the work as required in this RFP.
 8. Authorized negotiators – Include the names and phone numbers of personnel of your organization authorized to negotiate the proposed contract with Genesee County.
 9. Non-Discrimination compliance Statement – A statement indicating that the firm would agree not to refuse to hire, discharge, promote, demote or to otherwise discriminate in matters of compensation against any person solely or in part because of race, creed, color, sex, national origin, ancestry, physical handicap or sexual orientation.
 10. Additional Information and Comments – Include any other information that is believed to be pertinent but not specifically asked for elsewhere.
- L. Cost Proposal (shall consist of the items stated below) – The information requested in this section is required to support the reasonableness of your proposal. This portion of the proposal must be bound and sealed separately from the remainder of the proposal.
1. Labor Costs: Itemize so as to show the following for each category of personnel with a different rate per hour:
 - a) Category; e.g., Partner, Manager, etc.
 - b) Estimated hours
 - c) Rate per hour
 - d) Total cost for each category and for all labor needs
 2. Cost of Supplies and Materials – Itemize.
 3. Other Direct Costs – Itemize.
 4. General and Administrative Burden or Overhead – Indicate percentage and total.
 5. Transportation Costs – Show travel costs and per diem separately.
 6. Printing Price – state separately the price for printing the report on CD as well as hard copy. Ten (10) copies of the final report are required.

7. Price for Specific Task – State separately the cost for performing each task in Section 6. Scope of Services.
8. Total Price Bid for Project (not to exceed Price).
9. Alternate Payment Schedule – The proposer may provide an alternate payment schedule as indicated in Section 3.22.

Mr. Hopson covered the following information in **SECTION 8. EVALUATION CRITERIA:**

All proposals received shall be subject to an evaluation by the GCMPC and individuals deemed appropriate for the purpose of selecting the consulting firm with whom a contract will be executed. It is the intent of Genesee County to conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this RFP. Further, the County and the GCMPC reserves the right to use whatever reasonable and prudent evaluation techniques it deems appropriate.

The following factors, listed in order of importance, will be considered in determining the proposing that is most advantageous to the County and the GCMPC:

1. **Prior Experience:** This refers to the nature and extent of prior experience with similar projects, including the years that the firm organization has been in business and the list of references provided of appropriate client organizations.
2. **Capability:** This factor includes the ability of an eligible proposer to meet the terms of this RFP. Emphasis will also be placed on the soundness of the proposer's approach to the work as presented in the Statement of the Project, management Summary and Work plan. Emphasis will also be placed on performance of the work with the required timeframe as indicated in RFP #09-010, Section 7.2.K.5.
3. **Professional Personnel:** This refers to the competence of the professional personnel who would be assigned to the project by the prospective offeror. Qualifications of professional personnel will be measured by education and experience, with reference to experience on projects similar to that described in this RFP. Emphasis will also be placed upon the qualifications of the project manager and the amount of dedicated management planned for this project by the proposer.
4. **Cost Proposal:** Cost information as referenced in RFP #09-010, Section 7.2.L.1 through 7.2.L.8. This includes a not to exceed price for completion of the project as described in this RFP.

5. **Community Facilitation:** This refers to the approach for obtaining input and feedback from both public and private organizations in the study area. This includes the number, type and content of meetings and/or community input.
6. **Responsiveness of Proposal:** This criterion refers to the submitted proposal conforming to all the requirements stated in this RFP.

Mr. Hopson emphasized the importance of understanding how proposals will be evaluated, the required format of proposals and other important RFP requirements. It occurs frequently that proposers misunderstand how proposals will be evaluated. As a result, prospective proposers submit proposals they may not position the proposer for possible contract award.

Ms. Julie Hinterman, Director-Coordinator of GCMPC covered the following information for Section 6: Scope of Services.

The Genesee County Metropolitan Planning Commission, Community Development Program, invites sealed proposals from qualified consultants to conduct a comprehensive housing study to determine the need and/or location for a 50 unit senior affordable assisted living development located near Kearsley Daly Villa. The proposal must include an evaluation of the services most needed by senior citizens in an assisted living facility in Genesee County. Assisted living facilities are residential facilities that provide independent home areas for residents, but also provide assistance with daily living activities. They do not provide 24 hour home nursing care or supervision. The assisted living facilities are not licensed by the State of Michigan.

This assisted living facility will be potentially located in Genesee Township, but a thorough study of all areas, outside the City of Flint, should be conducted to determine where the need exists for affordable senior assisted living in Genesee County. This will be a collaborative effort with the Genesys Regional Medical Center and Eastside Senior Citizens Association. Twenty percent (20%) of these units will be available and affordable to persons at or below fifty percent (50%) of the area median income. HOME funds will be used, in conjunction with other funding sources, to complete this project.

Genesee County is located in Mid-Michigan with a population of 434,715. The 2006 American Community Survey indicates that there are 74,957 persons aged 60 years and older in Genesee County. The demographic analysis and feasibility and service study of the assisted living housing units should be conducted within Genesee County. The project shall include, but will not be limited to, the following tasks:

1. Demographic Analysis
2. Housing Analysis
3. Service Analysis

Questions:

1. **This appeared to be the same RFP from last year, was there no action taken?** The scope of services is slightly different from last year. Planning Commission staff decided to pursue another RFP after reviewing proposals from last year. Staff recognized the scope of service was not clear and is looking for a service component with the housing evaluation.
2. **Are you aware of any addenda?** No. However, at one addendum will be issued with minutes from today's meeting, and answers to questions received.
3. **Can we get a copy of the sign-in sheet?** No, but we will provide the firms and company representatives in attendance. This information will be provided as part of Addendum #1.
4. **Is best and final offer different than lowest responsible bid?** Yes, we typically pursue best and final offers to obtain the greatest value for the County. In doing so, the intent is to accept the proposal that is most advantageous to the County given the evaluation criteria. You should note that price/cost proposal is not the most important evaluation criterion.
5. **Where is the proposal location?** The Planning Commission is targeting the location at 3065 N. Genesee Rd., Genesee, MI. However, other sites around the County will be considered based on the data and recommendations provided by the contractor.
6. **Is the 25 to 50 units identified for a reason?** Staff feels this is the optimum number for the type of housing being looked at.
7. **Is it appropriate to contact Genesys and Eastside Senior Citizens Association for more information?** No, contact the Genesee County Purchasing Department for additional information.
8. **Federal funds are mentioned in RFP. Is the County only receiving federal funds?** The County will receive Federal funding, however, the County would like to see what other funding is needed and can be leveraged as part of the project.
9. **Is CD, jump drive or electronic format accepted?** The County requires the electronic copy of the proposal to be submitted on a CD or flash Drive. In addition, the electronic version should be submitted in MS Word, MS Excel and/or Adobe format.

10. **The project total should not exceed what amount?** We don't want to disclose any particular amount. It is incumbent on each proposer to submit a proposal that is consistent with the RFP requirements and represents the proposer's best effort to be selected for contract award.
11. **Do you accept staff biographies or resumes?** We asked for Resumes of the proposer's staff to be submitted with the proposal response (see RFP #09-010, Section 7.) However, the County would accept biographies that provide information that would be consistent with RFP requirements, and similar to staff resumes. We are looking for information about staff qualifications.
12. **Is this related to the CEDs study?** No.
13. **How many copies of the cost proposal need to be submitted?** Submit one copy of your firm's cost proposal consistent with the other requirements in RFP #09-010, Section 7.2.L.1-9). The County does not require ten copies of the cost proposal bound separately from the other submittals. Please note that ten copies of the other submittals referenced in RFP #09-010, Section 7 are required.
14. **Does the cost proposal need to be in a sealed envelope?** Yes, see page 17.
15. **Do you have a list of firms that could be recommended to partner with?** We are looking at consultants to address the service issues of seniors. The County has provided everyone today a booklet regarding senior services in Genesee County. However, we do not have a list of approved agencies/companies that would be qualified to assist prospective contractors with this effort.
16. **Any development standard that we should assume?** No.
17. **Is there a budget amount?** We have federal HOME dollars and have chosen 25 to 50 units. We are not sure how much the project will cost in total. In addition, we are hoping to secure more funding to support the completion of this project. In addition, the contractor's findings and recommendations will be used to do so.
18. **Is there a page limitation?** No.