

REQUEST FOR PROPOSALS

MICHIGAN STRATEGIC FUND

BUSINESS AND TOURISM PUBLIC RELATIONS AND SOCIAL MEDIA

RFP-CASE-320669

REMINDER

Please check your proposal to make sure you have included all of the specifications in the Request for Proposals. In addition, please submit an electronic version of each of the following:

- Technical Proposals (Section II-A);
- Price Proposal (Section II-B);
- Signed Independent Price Determination Certificate (Attachment B); and
- Conflicts of Interest Disclosure (if applicable) (Section II-G).

BIDDERS ARE RESPONSIBLE FOR ASSURING THAT THE FOLLOWING IDENTIFYING INFORMATION APPEARS IN THE SUBJECT LINE OF YOUR EMAIL: “RFP-CASE-320669 Technical Proposal” and “RFP-CASE-320669 Price Proposal” with *Company Name*, and “message 1 of 3” as appropriate if the bid consists of multiple emails.

The Michigan Strategic Fund (the “MSF”) will not respond to telephone inquiries, or visitation by Bidders or their representatives. Bidder’s sole point of contact concerning the RFP is below and any communication outside of this process may result in disqualification.

Contract Services
Michigan Strategic Fund
300 North Washington Square, 3rd Floor
Lansing, Michigan 48913
contractsandgrants@michigan.org

IMPORTANT DUE DATES

- **April 6, 2021, at 3:00 p.m.:** Questions from potential Bidders are due via email to contractsandgrants@michigan.org. Please note: The MSF will not respond to questions that are not received by the above date and time. In addition, questions that are phoned, faxed or sent through regular mail will not be accepted.
- **April 13, 2021, by close of business:** Responses to all qualifying questions will be posted on the MSF’s website, Michiganbusiness.org/320669.
- **May 19, 2021, at 3:00 p.m.:** Electronic versions sent separately of each of your Technical Proposal and Price Proposals due to the MSF via email to contractsandgrants@michigan.org. **Proposals will not be accepted via U.S. Mail or any other delivery method.**

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REQUEST FOR PROPOSAL
BUSINESS AND TOURISM PUBLIC RELATIONS AND SOCIAL MEDIA
RFP-CASE-320669

This Request for Proposals (the “RFP”) is issued by the Michigan Strategic Fund (the “MSF”), Contract Services unit (the “CS”). The Michigan Economic Development Corporation (the “MEDC”) provides administrative services associated with the programs and activities of the Michigan Strategic Fund Act on behalf of the MSF. CS is the sole point of contact with regard to all bidding and contractual matters relating to the services described in this RFP. CS is the only office authorized to change, modify, amend, alter, clarify, etc. the specifications, terms and conditions of this RFP and any contract(s) awarded as a result of this RFP (the “Contract”). CS will remain the SOLE POINT OF CONTACT throughout the bidding process. ***The MSF will not respond to telephone inquiries, or visitation by Bidders or their representatives. Bidder’s sole point of contact concerning the RFP is below and any communication outside of this process may result in disqualification.***

Contract Services
Michigan Strategic Fund
300 North Washington Square
Lansing, Michigan 48913
contractsandgrants@michigan.org

SECTION I STATEMENT OF WORK

A. PURPOSE

The purpose of this RFP is to obtain proposals for the Michigan Economic Development Corporation (MEDC) from public relations firms to support integrated public relations and social media services that promote Michigan to both business and consumer audiences. The MEDC anticipates executing a multi-year contract with the selected vendor and expects to add supplemental funding, if approved, each year of the contract term to continue implementation and enhancement of public relations and social media efforts.

B. BACKGROUND, OBJECTIVES AND DUTIES

The MEDC is the state's marketing arm and lead advocate for business development, job awareness and community development with the focus on growing Michigan's economy.

The organization desires to extend its comprehensive, fully integrated public relations efforts, which seek to attract, retain and grow businesses that deliver economic benefit and opportunity to the people of Michigan.

Within MEDC, the Marketing and Communications department markets the state to its selected audiences and serves as lead on paid and field marketing, public relations, earned media, social and digital media, video production, event planning and protocol events related to business development programs, travel and tourism, mobility initiatives and other placemaking initiatives within the organization.

Public Relations and Social Media Objectives

The MEDC is requesting agency proposals for services that will assist in the development and implementation of an integrated public relations and social media program. Proposed strategies and activities must:

- Promote Michigan as a world-class business location and four-season leisure travel destination.
- Generate new business prospects to the state through improved perception of Michigan as a desirable place to do business.
- Increase awareness of the full suite of services MEDC offers to Michigan entrepreneurs, businesses and communities.
- Increase the visibility of Michigan as a regional and national leisure travel destination.
- Strengthen the perception of Michigan as a desirable place to live, work and play.

These objectives meet the strategic focus of the MEDC to market the state and promote Michigan's image as a world-class business and leisure travel destination.

Business Objectives & Strategy

The MEDC's mission is to achieve long-term economic prosperity for Michiganders by investing in communities, enabling the growth of good jobs and promoting Michigan's strong image worldwide. MEDC public relations activities support the organization's mission by marketing the state and MEDC's services to attract, retain and grow target industries that deliver economic benefit to the people of the state. These efforts include earned coverage as well as owned content on website and social media properties.

RESPONSIBILITIES & QUALIFICATIONS

Qualifications, responsibilities and objectives are defined in the following sections by target audience. In addition:

- Contractor to develop a strategic communications plan, or plans, each year that supports MEDC's strategic focus areas, industries and programs.
- Applicants should highlight a proven capability to partner with additional agencies, including MEDC's selected vendors for business marketing and travel advertising services.
- Applicants should demonstrate a commitment to diversity, equity and inclusion in policy, practice and creative work.
- Applicants should show unquestioned passion for and commitment to Michigan.

TARGET AUDIENCE: BUSINESS AND COMMUNITY LEADERS

We target business decision makers, site selectors, entrepreneurs, community leaders and key business influencers and media. Public relations also drives thought leadership efforts, positioning Michigan as a leader of, and MEDC executives as subject matter experts in, key focus industries and economic development efforts overall. Crossover with consumer audiences exists in certain subject areas, such as talent. Key audiences include:

1. National Business Leaders and advisors in targeted industries where the MEDC has opportunities to influence executives and decision-makers to choose Michigan for new business investment and job creation or retention of current investment and workforce.
2. Michigan Business Leaders and Entrepreneurs focused on retention and growth investment across the state of Michigan.
3. Site Selection Influencers: who partner with industry decision makers considering future business attraction, investment, expansion and growth opportunities. Site influencers may include organizations formally hired to provide site selection services as well as other influencing advisors that may work with industry decision-makers (architects, attorneys, accountants, etc.).

Focus Industries

While it is not assumed that all MEDC industry targets will require the same levels of promotion, current target industries include:

- Mobility and Automotive Manufacturing – Building upon our uncontested automotive leadership to stay at the forefront of the mobility revolution.
- Professional and Corporate Services – Using the purchasing power of Michigan companies to attract corporate and professional service providers to the state.
- Medical Device Technology – Leveraging our existing medical device anchor companies and research assets to enable growth of the medical device industry.
- Engineering, Design and Development – Harnessing our talent base to become the research & development and industrial design capital of the world.
- Advanced Manufacturing – Positioning Michigan as a leader in Industry 4.0 and leveraging our talent to capture a larger share of growth in the defense and advanced materials industries.
- High Tech – Capitalizing on our existing mobility, software, manufacturing, engineering and design capabilities to grow Michigan’s tech footprint.

Raise awareness around MEDC’s suite of services: Programs and resources designed to support retaining, expanding and growing existing Michigan businesses.

- Pure Michigan Business Connect: Business-to-Business Buyer/Supplier network
- International Export Services: Financial and support services to assist Michigan companies entering the export market or expanding export activities into new markets.
- Entrepreneurship and Innovation: Financial and support services to assist stakeholders in technology commercialization and making connections to venture capital and other funding resources.
- Access to Capital: Increase the availability of capital for Michigan businesses at every stage of development.
- Mobility Industry: Programs and services that strengthen Michigan’s mobility ecosystem.
- Community Development: Programs and services that serve municipalities and developers with the goal of creating vibrant, thriving communities.

Public Relations

- Position Michigan within national media and targeted trade media as the place for business development and expansion
- Position Michigan with national media and tech and automotive outlets as the global leader in producing and developing the next generation of transportation technologies through mobility and EV initiatives.
- Position MEDC with in-state media, local partners, and the Michigan business

community as a resource for business growth opportunities within the state.

- Develop and promote proactive “good news” story creation and support.
- Leverage key national trends or stories to tell a “Why Michigan” story.
- Integrate and align public relations efforts with digital (website) and marketing strategies.
- Improve the perception of Michigan as a place to do business.
- Position Michigan within national venture capital communities as a place for investment.
- Improve the perception of Michigan as a place for entrepreneurial growth.
- Improve the perception of Michigan as an ideal location to live, work and play.
- Ensure a focus on diversity, equity and inclusion in all media plans and pitching.

Contractor Responsibilities

- Develop and implement an annual strategic and quarterly tactical communications plan for MEDC business messaging.
- Develop and proactively pitch national and trade media on major attraction announcements/industry trends, mobility events and announcements; provide any necessarily follow-up and tracking.
- Coordinate and draft bylines in national and trade publications for both earned opportunities and advertorial opportunities, in cooperation with MEDC marketing efforts.
- Plan, coordinate and execute media familiarization tours to Michigan, with themes that support [MEDC's strategic plan](#).
- Develop and implement strategy around thought leadership, both on a national level and in-state services.
- Support creation of content around thought leadership, success stories, mobility initiatives and more on michiganbusiness.org website.
- Support creation of content around bi-monthly statewide mobility newsletter.
- Support international efforts when needed, specifically tied to trade missions and business attraction events.
- Manage contracts with influencers, content providers and others as needed to implement strategic plan.
- Sub-contract specialized PR services as needed and in coordination with MEDC

communications team.

- Participate in regular calls and strategy meetings with MEDC staff, as well as MEDC's marketing agency of record.
- Conduct daily media tracking and coding.
- Prepare and provide as requested, and at a minimum monthly and annual reporting including, but not limited to open projects, account hours allocation, impressions generated and placements with key breakouts in specific categories.
- Provide as requested, but at a minimum, quarterly and annual reports recapping KPI performance (KPIs set at beginning of fiscal year), coverage, period-over-period comparisons, key successes, learnings and best practices.
- Support and provide additional metrics as required.

Social Media

MEDC's social media efforts have propelled the organization to become among the Top 10 most-followed statewide economic development agencies in the nation on Facebook, LinkedIn, Twitter and YouTube. MEDC's social media approach includes: amplification of MEDC's economic development initiatives, transparency into the MEDC organization, amplification of partner efforts and overall ecosystem success and customer service. There are currently 27 social channels managed across the organization.

The Contractor is expected to assist with, among other duties, community management of MEDC and Michigan Mobility social channels, creating an annual strategic plan for social media communications, maintaining and reporting social metrics and recommending and developing social content including infographics or other digital assets to advance strategic objectives.

Social Media Objectives

- Increase the number of MEDC social media followers to broaden reach of the MEDC message.
- Increase the number of Michigan Mobility social media followers to broaden the reach of Michigan's mobility and EV ecosystem message.
- Increase audience engagement to maximize exposure of MEDC content.
- Increase audience engagement to maximize exposure of Michigan Mobility content.
- Increase website traffic to michiganbusiness.org from MEDC social channels.
- Deploy MEDC-owned content, including custom content through marketing efforts, consistently and effectively across relevant platforms.

Contractor Responsibilities

- Assist with the development of an annual strategic social media communication plan aligned with both MEDC's overall business development and community development goals, as well as with the overall state of Michigan's goals around mobility and electrification.
- Maintain and contribute to editorial calendar across MEDC and Mobility Michigan channels, in coordinating with MEDC internal team members.
- Publish content via MEDC and Mobility Michigan social channels in coordination with MEDC internal team members.
- Monitor comments, replies and direct messages from those channels and engage with community members on comments, replies and direct messages.
- Monitor, amplify and engage with relevant partner and third-party content.
- Create infographics and other social assets that promote Michigan as a place that attracts, retains and supports businesses, fosters high wage skill growth, develops attractive places, catalyzes entrepreneurship, and has a thriving mobility ecosystem.
- Evaluate and implement opportunities for paid social media support and initiatives among key business audiences.
- Develop Social Media Playbooks as needed for events which MEDC is either a major sponsor or participant, to be shared with partners as well as internal MEDC employees to empower them to be involved socially and share updates before, during and after the event.
- Prepare and provide as requested and at a minimum monthly, quarterly and annually a report including organic impressions, individual engagements (likes, comments, shares), total engagements, engagement rate, link clicks, audience growth, best and worst and performing content, website referrals and other key metrics.
- Support and provide additional metrics as required.

TARGET AUDIENCES: LEISURE TRAVELERS

We target consumer media and influencer opportunities with an emphasis on generating awareness and inspiration with the following audiences:

- *Adventure Scouts (AS)*: Newer target audience for the brand identified in 2019. Younger, adventure-seeking demographic and relatively unfamiliar with Michigan. Travel experiences in Michigan resonant with this target. Important to elevate relevant travel opportunities within the appropriate channel/media mix for this target.
- *Sentimental Traveler (ST)*: This demographic is aware of and familiar with Michigan and is an important target base for the campaign that has been the primary target audience

since the inception of Pure Michigan. This audience is largely women who make the household travel decisions for the family. We need to keep Michigan consistently top of mind when they are exploring their next travel destination.

- *In-Market (both AS and ST):* In-state residents are actively planning and aware of Michigan travel opportunities. Target can become overwhelmed by the number of options and making the best decision for their limited vacation time. It remains imperative to continue connecting with this group due to out of state travel destinations engaging in-state residents.
- *Michigan Travelers and Fans:* Continue to bond with this demographic and leverage the power of these champions in promoting Michigan as a travel destination.

Public Relations

The public relations efforts are a core element of the Pure Michigan campaign's objective to drive leisure travel to, and from within the state. These efforts have been recognized nationally, being awarded 27 HSMIA Adrian Awards in the past seven years, including Best of Show for Public Relations in 2014 and Platinum in 2020.

The Contractor will be expected to work collaboratively with MEDC's public relations and social media team and the Travel Michigan team to develop and execute innovative and engaging strategies, tactics, events and pitches to earn media coverage nationally, regionally and in-state as well as across platforms including broadcast, print, digital media and influencers.

Key national markets for public relations efforts will include New York City, Atlanta, Dallas, Louisville and Toronto. Key regional markets for public relations efforts will include Chicago, Toronto, Southern Ontario, Cleveland, Columbus, Cincinnati, Dayton, Toledo, Indianapolis, Fort Wayne, South Bend, Milwaukee, Green Bay, Minneapolis and St. Louis. Key in-state markets include Detroit, Grand Rapids, Lansing, Flint and Traverse City.

Travel Michigan collaborates closely with local and statewide industry partners on a significant number of its public relations initiatives. The Contractor will be expected to cultivate relationships with the public relations professionals within Michigan's tourism industry and incorporate opportunities for local partners within various projects and initiatives.

Public Relations Objectives

- Position Michigan within national leisure travel and lifestyle media as a top destination for travelers in the U.S.
- Position Michigan as a top leisure travel destination within influencer media in key areas, including outdoor recreation, food & craft beverage, arts & culture, authentic cities and golf.
- Highlight the diversity of the state's leisure travel offerings, including seasonality and geographic diversity.

- Create media pitches to increase awareness of Michigan’s “hidden gems” and diverse communities.
- Encourage in-state travelers to travel to new regions of the state and create opportunities for weekend getaways.
- Inspire travelers to extend their stay (instead of a day trip, an overnight trip; instead of a weekend trip a week-long trip, etc.)
- Ensure a focus on diversity, equity and inclusion in all media plans and pitching.
- Integrate public relations efforts with social, digital and campaign marketing strategies.

Contractor Responsibilities

- Develop and implement an annual strategic and quarterly tactical communications plan for Travel Michigan leisure travel messaging.
- Develop and proactively pitch in-state, regional and national media – print, broadcast and digital – on leisure travel story opportunities; provide any necessary follow-up and tracking.
- Develop public relations strategies around key activity-based activities (such as cultural experiences, craft beer, winter recreation).
- Develop a long-lead pitch strategy, vehicle for delivery and quarterly results report.
- Develop and execute a regular outreach to industry communications representatives to learn of new openings, events, initiatives and create strong line of communication between Travel Michigan PR efforts and those of local partners.
- Plan, coordinate and execute media and influencer familiarization tours to Michigan.
- Pitch and coordinate in-market media interviews for key Travel Michigan staff when they are traveling in markets both in-state and out-of-state.
- Identify and execute opportunities to promote the Pure Michigan brand and travel experience in front of national leisure travel audiences, including in-market media events, key brand partnership integrations, etc.
- Manage contracts with influencers, content providers and other as needed to implement strategic plan.
- Attend the Pure Michigan Governor’s Conference on Tourism annually.
- Collaborate with industry partners, including Convention and Visitors Bureaus, trade associations and destination marketing organizations throughout the state.

- Participate in regular calls and strategy meetings with MEDC and Travel Michigan staff as well as Travel Michigan’s marketing agency of record.
- Provide monthly reporting including, but not limited to open projects, account hours allocation, impressions generated and placements with key breakouts in specific categories.
- Provide upon request, but at a minimum quarterly and annual reports recapping KPI performance (KPIs set at beginning of fiscal year), coverage, year-over-year comparisons, key successes, learnings and best practices.
- Support and provide additional metrics as requested.

Social Media

Social media and word of mouth are among the most persuasive means of influencing travel decisions. Social media plays a pivotal role through every stage of the traveler’s decision-making process, from dreaming, researching, booking a trip and, ultimately, sharing their experience once at their vacation destination. 74 percent of Americans say they spend time using social media while on vacation (MDG Advertising, 2018), and 60 percent of Americans use social media for travel planning (Value Penguin, 2019).

Pure Michigan has a loyal and engaged community of more than 2.5 million followers across Facebook, Twitter, Instagram, YouTube and Pinterest. The general duties of the Contractor include curating and creating engaging content that informs and inspires people to travel to Michigan, providing community management, developing and executing a paid strategy around amplifying organic posts, developing influencer strategies and coordinating with MEDC/Travel Michigan digital team members to ensure a robust website referral effort.

Social Media Objectives

- Increase the number of social media followers to broaden reach of the Pure Michigan message.
- Increase and create deliberate opportunities for audience engagement to maximize exposure of Pure Michigan content and build loyalty among fans.
- Increase website traffic to michigan.org from Pure Michigan social channels.
- Engage and collaborate with the public relations, marketing and web teams to ensure cohesion across the public-facing aspects of the brand.
- Deploy MEDC-created content, including videos, consistently and effectively across relevant platforms.

Contractor Responsibilities

- Assist with the development of an annual strategic social media communication plan aligned with both MEDC’s overall strategic objectives and Travel Michigan’s

campaign objectives.

- Develop and maintain a quarterly editorial calendar and management of Pure Michigan social channels including Facebook, Twitter, Instagram and Pinterest. Pure Michigan is also active on YouTube which is managed internally by the MEDC communications team.
- Create, curate and publish social content that promotes Michigan as a four-season travel destination and aligns with key activities and passion areas.
- Curate, vet and facilitate proper approvals on user generated content utilized across Pure Michigan social channels.
- Provide community management including responding to comments, engaging the public and interacting with followers to build loyalty and inspire visits to Michigan.
- Evaluate and implement opportunities for paid social media support across Facebook, Twitter, Instagram and other platforms.
- Coordinate and conduct periodic Twitter chats to engage travel partners and the community.
- Curate content and contribute to ongoing management of the Pure Michigan Pinterest account, including publishing monthly pins featuring content from michigan.org and relevant partner content.
- Develop recurring content themes, social media engagement activities and promotions to encourage community participation as part of a comprehensive social media strategy.
- Have awareness of, and provide recommendations around trends and best practices in social media, new channels, changes in consumer behavior on social, etc.
- Prepare and provide monthly social media report including organic impressions, individual engagements (likes, comments, shares), total engagements, engagement rate, link clicks, audience growth, best and worst and performing content, website referrals and other key metrics.
- Prepare and provide monthly social media reports including organic impressions, individual engagements (likes, comments, shares), total engagements, engagement rate, link clicks, audience growth, best and worst and performing content, website referrals and other key metrics. Please identify what technology you use to assist with online monitoring and measurement (e.g. Social Studio, BrandWatch, Sprout Social or others) and publishing (Hootsuite, Sprout Social or others).
- Provide an annual report at the end of the fiscal year recapping KPI performance (KPIs set at beginning of fiscal year), impression and engagement metrics, year-over-year comparisons, key successes, learnings and best practices.

SECTION II PROPOSAL FORMAT

To be considered, each Bidder must submit a COMPLETE proposal in response to this RFP using the format specified. Bidder's proposal must be submitted in the format outlined below. There should be no attachments, enclosures, or exhibits other than those required in the RFP or considered by the Bidder to be essential to a complete understanding of the proposal. Each section of the proposal should be clearly identified with appropriate headings:

A) TECHNICAL PROPOSAL

1. Business Organization and History – State the full name, address, and phone and facsimile number of your organization and, if applicable, the branch office or other subordinate element that will perform, or assist in performing, the work hereunder. Indicate whether it operates as an individual, partnership, or corporation; if as a corporation, include the state in which it is incorporated. If appropriate, the proposal must state whether the organization is licensed to operate in the State of Michigan.
2. Statement of the Problem – State in succinct terms your understanding of the problem(s) presented by this RFP.
3. Narrative – Include a narrative summary description of the proposed effort and of the services(s)/products(s) that will be delivered.
4. Technical Work Plans – Provide a detailed research outline and timelines for accomplishing the work.
5. Prior Experience – Describe the prior experience of your organization which you consider relevant to the successful accomplishment of the project defined in this RFP. Include sufficient detail to demonstrate the relevance of such experience. Proposals submitted should include, in this Section, descriptions of qualifying experience to include project descriptions, costs, and starting and completion dates of projects successfully completed; also include the name, address, and phone number of the responsible official of the client organization who may be contacted.

The MSF may evaluate the Bidder's prior performance with the MSF, and prior performance information may be a factor in the award decision.

6. Project Staffing – The Bidder must be able to staff a project team which possesses talent and expertise in the field of the requirements of this RFP. Identify a Project Manager and staff assigned by name and title. Include biographies, experience and any other appropriate information regarding the work team's qualification for this initiative. Indicate staff turnover rates. Show where the project team will be physically located during the time they are engaged in the work. Indicate which of these individuals you consider key to the successful completion of the work. Indicate the amount of dedicated management time for the Bidder's Project Manager and other key individuals. Do not include any financials for the contemplated work within the Technical Proposal. Resumes of qualifications should be supplied for proposed project personnel.

Please Note: The MSF further reserves the right to interview the key personnel assigned by the Contractor to this project and to recommend reassignment of personnel deemed unsatisfactory.

7. Subcontractors – List here all subcontractors that will be engaged to accomplish the project described in this RFP; include firm name and address, contact person and complete description of work to be subcontracted. Include descriptive information concerning subcontractor's organization and abilities. Also, the information provided in response to A-5, above, should include detailed information about each potential subcontractor.

8. Bidder's Authorized Expediter – Include the name and telephone number of person(s) in your organization authorized to expedite any proposed contract with the MSF.

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

B) PRICE PROPOSAL

Provide the cost/rate/price information for all firms/persons named in your Price Proposal to demonstrate the reasonableness of your Price Proposal. Attach a schedule of all expenses covering each of the services and activities identified in your proposal.

The MSF is exempt from federal excise tax, and state and local sales taxes. The Price Proposal should not include taxes.

THE PRICE PROPOSAL MUST BE IDENTIFIED AND SENT SEPARATELY FROM THE TECHNICAL PORTION OF YOUR PROPOSAL ACCORDING TO THE INSTRUCTIONS OF THIS RFP. Separately sealed price proposals will remain sealed until the JEC has completed evaluation of the technical proposals.

Bidders Please Note: Rates quoted in response to this RFP are firm for the duration of the Contract; no price increase will be permitted.

C) PROPOSAL SUBMITTAL

Submit separately marked electronic versions of each of your Technical Proposal and Price Proposal to the MSF via email to contractsandgrants@michigan.org not later than **3:00 p.m. on** May 19, 2021. The MSF has no obligation to consider any proposal that is not timely received. **Proposals will not be accepted via U.S. Mail or any other delivery method.**

BIDDERS ARE RESPONSIBLE FOR ASSURING THAT THE FOLLOWING IDENTIFYING INFORMATION APPEARS IN THE SUBJECT LINE OF YOUR EMAIL: "*RFP-CASE-320669 Technical Proposal*" and "*RFP-CASE-320669 Price Proposal*" with *Company Name*, and "*message 1 of 3*" as appropriate if the bid consists of multiple emails.

**SECTION III
RFP PROCESS AND TERMS AND CONDITIONS**

A) PRE-BID MEETING/QUESTIONS

A pre-bid meeting will not be held. Questions from Bidders concerning the specifications in this RFP must be received via e-mail no later than **3:00 pm on April 6, 2021**. Questions must be submitted to:

Contract Services
contractsandgrants@michigan.org

B) PROPOSALS

To be considered, Bidders must submit a complete response to this RFP, using the format provided in Section II of this RFP, by **3:00 p.m. on May 19, 2021**. No other distribution of proposals is to be made by the Bidder.

The Technical Proposal must be **signed physically or electronically** by an official of the Bidder authorized to bind the Bidder to its provisions. The proposal must include a statement as to the period during which it remains valid; this period must be at least one hundred fifty (150) days from May 19, 2021. The rates quoted in the Price Proposal must remain firm for the period indicated in Section II.

C) ECONOMY OF PREPARATION

Each proposal should be prepared simply and economically, providing a straightforward, concise description of the Bidder's ability to meet the requirements of the RFP. Emphasis should be on completeness and clarity of content.

D) SELECTION CRITERIA

Responses to this RFP will be evaluated based upon a three-step selection process. The proposal must address the requirements described in Section II of this RFP.

The first step is an evaluation of which proposals satisfactorily meet the requirements of this RFP as stated in Section II.

1) Step I – Initial evaluation for compliance

a) *Proposal Content* – Contract Services will screen the proposals for technical compliance to include but not be limited to:

- Timely submission of the proposal.
- Technical Proposal and Price Proposal clearly identified and sent separately.
- Proposal signed physically or electronically by an official of the Bidder authorized to bind the Bidder to its provisions.
- Proposals satisfy the form and content requirements of this RFP.

2) Step II – Criteria for Satisfactory Technical Proposals

- a.) During the second step of the selection process, proposals will be considered by a Joint Evaluation Committee (the “JEC”) comprised of individuals selected by the MSF. Only those proposals that satisfy the requirements described in this RFP, as determined in the sole discretion of the JEC, will be considered for evaluation in Step II. The JEC reserves the right to request additional information from any Bidder.
- b.) *Competence, Experience and Staffing Capacity* – The proposal should indicate the ability of the Bidder to meet the requirements of this RFP, especially the time constraints, quality, and recent projects similar to that described in this RFP. The proposal should indicate the competence of the personnel whom the Bidder intends to assign to the project, including education and experience, with particular reference to experience on projects similar to that described in this RFP and qualifications of Bidder’s Project Manager and the Project Manager’s dedicated management time, as well as that of other key personnel working on this project.

		Weight
1.	Statement of Work	40
2.	Bidder Information	30
3.	Prior Experience	15
4.	Staffing	15
TOTAL		100

- c.) During the JEC’s review, Bidders may be required to make oral presentations of their proposals to the JEC. These presentations provide an opportunity for the Bidders to clarify the proposals. The MSF will schedule these presentations, if required by the JEC.
- d.) Only those proposals receiving a score of **80 points or more** in the technical proposal evaluation will have their pricing evaluated to be considered for award.

3) Step III – Criteria for Satisfactory Price Proposal

- a.) Based on what is in the best interest of the MSF, the MSF will award the Contract considering value, quality, and the ability to meet the objectives of this RFP, of proposals that were approved as a result of this two-step evaluation process.
- b.) The MSF reserves the right to consider economic impact on the State of Michigan when evaluating proposal pricing. This includes, but is not limited to: job creation, job retention, tax revenue implications, and other economic considerations.
- c.) The award recommendation will be made to the responsive and responsible Bidder who offers the best value to the MSF and the State of Michigan. Best value will be determined by the Bidder meeting the minimum point threshold and offering the *best proposal that meets the objectives of the RFP.*

- d.) The MSF reserves the right to award to another “best value” contractor in case the original Awardee does not accept the award.

E) BIDDERS COSTS

The MSF is not liable for any costs incurred by any Bidder prior to signing of the Contract by all parties.

F) TAXES

The MSF may refuse to award a contract to any Bidder who has failed to pay any applicable taxes or if the Bidder has an outstanding debt to the State of Michigan or the MSF.

Except as otherwise disclosed in an exhibit to the Proposal, Bidder certifies that all applicable taxes are paid as of the date the Bidder’s Proposal was submitted to the MSF and the Bidder owes no outstanding debt to the State of Michigan or the MSF.

G) CONFLICT OF INTEREST

The Bidder must disclose, in an exhibit to the proposal, any possible conflicts of interest that may result from the award of the Contract or the services provided under the Contract.

Except as otherwise disclosed in the proposal, the Bidder affirms that to the best of its knowledge there exists no actual or potential conflict between the Bidder, the Bidder’s project manager(s) or its family’s business or financial interests (“Interests”) and the services provided under the Contract. In the event of any change in either Interests or the services provided under the Contract, the Bidder will inform the MSF regarding possible conflicts of interest which may arise as a result of such change and agrees that all conflicts shall be resolved to the MSF’s satisfaction or the Bidder may be disqualified from consideration under this RFP. As used in this Section, “conflict of interest” shall include, but not be limited to, the following:

- 1) Giving or offering a gratuity, kickback, money, gift, or anything of value to a MSF official, officer, or employee with the intent of receiving a contract from the MSF or favorable treatment under a contract;
- 2) Having or acquiring at any point during the RFP process or during the term of the Contract, any contractual, financial, business or other interest, direct or indirect, that would conflict in any manner or degree with Bidder’s performance of its duties and responsibilities to the MSF under the Contract or otherwise create the appearance of impropriety with respect to the award or performance of the Contract; or
- 3) Currently in possession of or accepting during the RFP process or the term of the Contract anything of value based on an understanding that the actions of the Bidder or its affiliates or Interests on behalf of the MSF will be influenced.

H) BREACH OF CONTRACT

Except as otherwise disclosed in an exhibit to Bidder's proposal, Bidder is not in material default or breach of any contract or agreement that it may have with the State of Michigan or any of its departments, commissions, boards or agencies, or any other public body in the State of Michigan. Further, Bidder represents and warrants that it has not been a party to any contract with the State of Michigan or any public body that was terminated within the previous five (5) years because the Bidder failed to perform or otherwise breached an obligation of such contract.

I) DISCLOSURE OF LITIGATION

Except as otherwise disclosed in an exhibit to Bidder's proposal, there is no criminal litigation, investigations or proceedings involving the Bidder (and each subcontractor, if subcontractors will be used to provide the goods/services requested under this RFP) or any of the Bidder's officers or directors or any litigation or proceedings under the Sarbanes-Oxley Act. In addition, Bidders must disclose in the exhibit requested under this Section of the RFP any civil litigation, arbitration or proceeding to which the Bidder (or, to the extent Bidder is aware, any subcontractor) is a party and which involves: (1) disputes that might reasonably be expected to adversely affect the viability or financial stability of the Bidder (or subcontractor); or (2) a claim or written allegation of fraud or breach of contract against Bidder (or, to the extent Bidder is aware, subcontractor), by a governmental or public entity arising out of their business dealings with governmental or public entities. Details of any settlements which Bidder is prevented from disclosing under the terms of the settlement may be annotated as such. Bidders must also disclose any investigations by the Internal Revenue Service or any other federal or state taxing body or court.

J) FALSE INFORMATION

If the MSF determines that a Bidder purposefully or willfully submitted false information in response to this RFP, the Bidder will not be considered for an award and any resulting Contract that may have been executed may be terminated.

K) ADDITIONAL DISCLOSURE

All Bidders should be aware that proposals submitted to the MSF in response to this RFP may be subject to disclosure under the provisions of Public Act 442 of 1976, as amended, known as the Freedom of Information Act ("FOIA"). Accordingly, confidential information should be excluded from Bidders' proposals. Bidders, however, are encouraged to provide sufficient information to enable the MSF to determine the Bidder's qualifications and to understand or identify areas where confidential information exists and could be provided. The FOIA also provides for the complete disclosure of the Contract and any attachments or exhibits thereto.

L) PRICES HELD FIRM

LENGTH OF TIME PRICES ARE TO BE HELD FIRM: All rates quoted in Bidder's response to this RFP will be firm for the duration of the Contract. No price changes will be permitted. IN THE EVENT THAT PROPOSED CHANGES ARE NOT ACCEPTABLE TO THE MSF, THE CONTRACT SHALL BE TERMINATED AND THE MODIFIED CONTRACT SHALL BE SUBJECT TO COMPETITIVE BIDDING.

M) BEST AND FINAL OFFER

At any time during the evaluation process, the JEC may request a Best and Final Offer (“BAFO”) from any Bidder. This will be the final opportunity for a Bidder to provide a revised proposal. The scope of the changes allowed in the BAFO will be published as part of the issuance of the BAFO request.

Bidders are cautioned to propose the best possible offer at the outset of the process, as there is no guarantee that any Bidder will be allowed an opportunity to engage in Pricing Negotiations or requested to submit a Best and Final Offer.

N) CLARIFICATION/CHANGES IN THE RFP

Changes made to the RFP as the result of responses made to qualifying questions or concerns will be posted on Michiganbusiness.org/320669. Applicants are encouraged to regularly check this site for changes or other information related to the RFP.

O) ELECTRONIC BID RECEIPT

ELECTRONIC VERSIONS OF EACH OF YOUR TECHNICAL AND PRICE PROPOSALS SENT SEPARATELY MUST BE RECEIVED AND TIME-STAMPED BY THE MSF TO contractsandgrants@michigan.org, ON OR BEFORE **3:00 p.m. on May 19, 2021**. Bidders are responsible for timely submission of their proposal. THE MSF HAS NO OBLIGATION TO CONSIDER ANY PROPOSAL THAT IS NOT RECEIVED BY THE APPOINTED TIME.

P) RESERVATION OF MSF DISCRETION

Notwithstanding any other statement in this RFP, the MSF reserves the right to:

- 1) reject any and all proposals;
- 2) waive any errors or irregularities in the bidding process or in any proposal;
- 3) rebid the project;
- 4) negotiate with any Bidder for a reduced price, or for an increased price to include any alternates that the Bidder may propose;
- 5) reduce the scope of the project, and rebid or negotiate with any Bidder regarding the revised project; or
- 6) defer or abandon the project.

The MSF’s decision is final and not subject to appeal. Any attempt by an applicant, collaborating entity, or other party of interest to the project to influence the awards process, to appeal, and/or take any action, including, but not limited to, legal action, regarding the proposal or awards process in general may result in the applicant’s disqualification and elimination from the award process.

Q) JURISDICTION

Any legal action arising from or concerning this RFP shall be brought in the Michigan Court of Claims or, as appropriate, the Ingham County Circuit Court in Ingham County, Michigan. Nothing

in this RFP shall be construed to limit the rights and remedies of the MSF that are otherwise available.

R) ADDITIONAL CERTIFICATION

Pursuant to Public Act 517 of 2012, an Iran linked business is not eligible to submit a bid on a request for proposal, with a public entity.

Bidders must include the following certification in the technical proposal:

“Bidder certifies that it is not an Iran-linked business as defined in MCL 129.312.”

Failure to submit this certification will result in disqualification from consideration.

**SECTION IV
CONTRACTUAL TERMS AND CONDITIONS**

A) CONTRACT TERMS AND CONDITIONS

- 1) The Contract – The proposal selected will be subject to the terms and conditions of the MSF’s Professional Services Contract (the “Contract”) in substantially the same form as attached to this RFP as Attachment A. The MSF reserves the right to modify any provisions of the Contract.
- 2) Term of Work – It is estimated that the activities in the proposed Contract will cover the period October 1, 2021 through September 30, 2022, with up to four, one-year extensions. The MSF, in its sole discretion, may extend the Term and allocate additional resources, subject to available funding.
- 3) Modification of Service – The MSF reserves the right to modify the requested services during the course of the Contract. Such modifications must be made in writing and may include the addition or deletion of tasks or any other modifications deemed necessary. Any changes in pricing proposed by the bidder resulting from the requested changes are subject to acceptance by the MSF. Changes may be increases or decreases.

In the event changes are not acceptable to the MSF, the Contract shall be subject to competitive bidding based upon the new specifications.

- 4) Subcontracting – The MSF reserves the right to approve any subcontractors for the Contract and to require the bidder, upon award of the Contract, to replace subcontractors that the MSF finds to be unacceptable.
- 5) Award of Contract – The MSF reserves the right to award all or any part of this RFP and, based on what is in the best interest of the MSF, the MSF will award the Contract considering price, value and quality of the bids.

B) CONTRACTOR RESPONSIBILITIES

The selected Bidder will be required to assume responsibility for all contractual activities offered in this RFP whether or not the Bidder performs them. Further, the MSF will consider the selected Bidder to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the Contract.

C) ACCEPTANCE OF PROPOSAL CONTENT

If awarded a Contract, the contents of this RFP will become contractual obligations. The following constitute the complete and exclusive statement of the agreement between the parties as it relates to this transaction:

- 1) This RFP (including subsequent written clarification provided in response to questions raised by email) and any Addenda thereto; and
- 2) Final executed Contract.

In the event of any discrepancies between the above documents, the final executed Contract shall control. Failure of the successful Bidder to accept these obligations may result in cancellation of the award.

D) PROJECT CONTROL AND REPORTS

1) Project Control

- a) The selected Bidder (the “Contractor”) will carry out this project under the direction and control of the Business Support Unit of the MSF.
- b) The MSF will appoint a Contract Manager for this project. Although there will be continuous liaison with the Contractor team, the Contract Manager will meet with the Contractor's project manager for the purpose of reviewing progress and providing necessary guidance to the Contractor in solving problems which arise.
- c) The Contractor will submit brief written monthly summaries of progress which outline the work accomplished during the reporting period; work to be accomplished during the subsequent reporting period; problems, real or anticipated which should be brought to the attention of the Contract Manager and notification of any significant deviation from previously agreed upon work plans.
- d) Within five (5) working days of the execution of the Contract, the Contractor will submit a work plan to the Contract Manager for final approval. This work plan must be in agreement with Section III-A of this RFP as proposed by the Bidder and accepted by the MSF for contract, and must include the following:
 - (i) The Contractor's project organizational structure.
 - (ii) The Contractor's staffing table with names and titles of personnel assigned to the project. This must be in agreement with staffing of the accepted proposal. Necessary substitutions due to change of employment status and other unforeseen circumstances may only be made with prior approval of the MSF.
 - (iii) The project breakdown showing sub-projects, activities and tasks, and resources required and allocated to each.
 - (iv) The time-phased plan in the form of a graphic display, showing each event, task, and decision point in your work plan.

ATTACHMENT A

**PROFESSIONAL SERVICES CONTRACT
TERMS AND CONDITIONS**

The Michigan Strategic Fund (the "MSF") enters into a binding agreement for professional services (the "Agreement") with CONTRACTOR (the "Contractor"). The MSF and Contractor shall sometimes be referred in this Agreement individually as a "Party" or collectively as "Parties."

Contractor: Name
 Address
 Address

I. NATURE OF SERVICES

Contracts and Grants to fill in a description of the Nature of Services based upon the information in the CASE.

II. PERFORMANCE SCHEDULE

Starting Date: MONTH XX, 20XX

Ending Date: MONTH XX, 20XX

The term of this Agreement (the "Term") shall begin on the Starting Date and end on the Ending Date, unless terminated earlier, as permitted under Section V(J) of this Agreement.

III. COMPENSATION INFORMATION

- A) The MSF agrees to pay Contractor an amount not to exceed XXX Dollars (\$XXX) during the Term. An initial payment in the amount of XXX Dollars (\$XXX) shall be made by the MEDC to the Contractor within thirty days of the execution of this Agreement by both Parties (the "Initial Payment"). This amount includes all embedded expenses.
- B) Subsequent payment(s) Payment under this Agreement shall be made by the MSF to Contractor upon receipt and approval by the Contract Manager, as identified in Section IV, of Contractor's billing statement(s) stating that the work for which payment is requested has been appropriately performed. Contractor shall provide Contractor's billing statement(s) to Contract Manager or at Contract Manager's direction on a monthly basis. Contract Manager shall provide Contractor with appropriate submission instructions of Contractor's billing statement(s).
- C) All billing statement(s) must reflect actual work done. The specific details of billing statement(s) and payments will be agreed upon between the Contract Manager and the Contractor after the Agreement has been signed and accepted by both the Contractor and the MSF.

- D) Public Act 533 of 2004 requires that payments under this Agreement be processed by electronic funds transfer (EFT). Contractor is required to register to receive payments by EFT at the State Integrated Governmental Management Applications (SIGMA) Vendor Self Service (VSS) website (www.michigan.gov/VSSLogin).
- E) Changes in the budget will be allowed only upon prior review and written approval by the Contract Manager.
- F) Contractor's billing statement(s) may be subject to a final audit prior to the release of final payment.

IV. MSF CONTRACT MANAGER

The Michigan Economic Development Corporation (the "MEDC") provides administrative services to the MSF. Contractor should communicate with the following MEDC representative or designee regarding this Agreement:

[Name] (the "Contract Manager")
Michigan Economic Development Corporation
300 North Washington Square
Lansing, Michigan 48913
xxx@michigan.org

V. TERMS AND CONDITIONS

A) Contractor Duties

Contractor agrees to undertake, perform, and complete the services described in Exhibit A, which is incorporated herein by reference. In the event of any inconsistency between the provisions of Exhibit A and this Agreement, the provisions of this Agreement shall control.

B) Independent Contractor

Contractor will act as an independent contractor under this Agreement, and neither Contractor nor any employee or agent or contract personnel of Contractor is, or shall be deemed to be, an employee of the MSF due to this Agreement and the relationship between Contractor and MSF. In its capacity as an independent contractor, Contractor agrees to and represents the following:

- 1) Contractor will provide the services under this Agreement free from the direction or control of the MSF or the MEDC as to means, manners, and methods of performance;
- 2) Contractor has the right, and does fully intend, to perform services for third parties during the Term;
- 3) Contractor acknowledges that any work product developed by Contractor in performance of this Agreement shall be the sole property of the MSF and the MSF shall have the right to copyright or otherwise protect its rights in and ownership of the work product;

- 4) The services required by this Agreement shall be performed by Contractor, or Contractor's employees or contract personnel, and the MSF or the MEDC shall not hire, supervise, or pay any assistants to help Contractor;
- 5) Neither Contractor nor Contractor's employees or contract personnel shall receive any training from the MSF or the MEDC in the professional skills necessary to perform the services required by this Agreement;
- 6) Neither Contractor nor Contractor's employees or contract personnel shall be required by the MSF or the MEDC to devote full time to the performance of the services required by this Agreement; and
- 7) Contractor does not receive the majority of its annual compensation from the MSF or the MEDC.

The Parties acknowledge and agree that the MSF is entering into this Agreement with reliance on the representations made by Contractor relative to its independent contractor status.

C) **Permits and Licenses**

Contractor declares that Contractor has complied with all federal, state and local laws requiring any business permits, certificates or licenses required to carry out the services to be performed under this Agreement, and Contractor will maintain those permits, certificates, and/or licenses throughout the Term.

D) **Materials**

Contractor will furnish all materials, equipment and supplies used to provide the services required by this Agreement.

E) **State and Federal Taxes**

The MSF and the MEDC will not:

- 1) Withhold FICA (Social Security and Medicare taxes) from Contractor's payments or make FICA payments on Contractor's behalf; or
- 2) Make state or federal unemployment compensation contributions on Contractor's behalf, or withhold state, federal, or local income tax from Contractor's payments.

Contractor shall pay all taxes incurred while performing services under this Agreement, including, but not limited to, all applicable income taxes. If requested by the MSF or the MEDC, Contractor shall provide proof that such payments have been made.

F) **Fringe Benefits**

Contractor understands that neither Contractor nor Contractor's employees or contract personnel are eligible to participate in any employee pension, health, vacation pay, sick pay, or other fringe benefit plan of the MSF or the MEDC.

G) **Workers' Compensation**

The MSF or the MEDC shall not obtain workers' compensation insurance on behalf of Contractor or Contractor's employees. If Contractor hires employees to perform any work under this Agreement, Contractor shall cover those employees with workers' compensation insurance and shall maintain such insurance during the Term. The MSF or the MEDC may, in its discretion, require Contractor to provide evidence of such coverage.

H) **Unemployment Compensation**

The MSF or the MEDC shall make no state or federal unemployment compensation payments on behalf of Contractor or Contractor's employees or personnel. Contractor will not be entitled to these benefits in connection with work performed under this Agreement. If Contractor files a petition for and receives unemployment compensation, the total amount of unemployment compensation awarded to and received by Contractor shall be deducted from and be an offset against the amount of compensation due and payable to Contractor by the MSF under this Agreement.

I) **Access to Records**

During the Term, and for seven (7) years after the Ending Date, Contractor shall maintain reasonable records, including evidence that the requested services actually were performed and the identity of all individuals paid for such services, and shall allow access to those records by the MSF, the MEDC or their authorized representative at any time during this period.

J) **Termination**

Either Party may terminate its obligations under this Agreement by giving the other Party thirty (30) calendar days prior written notice of such termination.

The MSF may immediately terminate this Agreement upon written notice to Contractor if Contractor materially breaches its obligations under this Agreement or engages in any conduct which the MSF, in its sole discretion, determines has or could have an adverse impact on the State of Michigan's (the "State") or the MSF's reputation or interests. In addition, the MSF may immediately terminate this Agreement upon written notice to Contractor, without further liability to the MSF or the State, its departments, agencies, and employees, if Contractor, an officer of Contractor, or an owner of a 25% or greater share of Contractor is convicted of a criminal offense relating to a State, public, or private contract or subcontract; or convicted of a criminal offense including, but not limited to, any of the following: embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, attempting to influence a public employee to breach the ethical conduct standards for State employees; convicted under state or federal antitrust statutes; or convicted of any other criminal offense that, in the sole discretion of the MSF, reflects on Contractor's business integrity.

Contractor acknowledges that MSF's performance of its payment obligation is dependent upon the continued approval of funding and/or the MSF's continued receipt of State funding. In the event that the State Legislature, the State Government or any State official, public body corporate, commission, authority, body or employees, including the MSF:

- (i) takes any action which fails to provide, terminates or reduces the funding that is related to the source of funding for this Agreement; or
- (ii) takes any action that is unrelated to the source of funding for this Agreement, but affects the MSF's ability to perform obligations under this Agreement, the MSF may terminate this Agreement by providing thirty (30) calendar days notice prior to the effective date of cancellation. In the event, however, that the action of the State Legislature, the State of Michigan or MSF results in an immediate absence or termination of funding, this Agreement may be terminated effective immediately upon delivery of notice to the Contractor. In the event of immediate termination of funding, the MSF will make payment through the effective date of termination for any undisputed services rendered and expenses incurred.

The MSF shall have no obligation to Contractor for any fees or other payments incurred in connection with this Agreement after the effective date of termination. Upon termination, all work product prepared or produced by Contractor pursuant to this Agreement shall be immediately delivered to the MSF. Payment for any undisputed services rendered and expenses incurred through the effective date of termination will then promptly be made by the MSF. Any Initial Payment made to the Contractor is subject to reimbursement in an amount determined by the Contract Manager in the event the Contractor terminates the Agreement prior to the Ending Date.

K) MEDC and MSF Employees

Contractor will not hire any employee of the MEDC or MSF to perform any services covered by this Agreement without prior written approval from the Chief Executive Officer of the MEDC or President of the MSF.

L) Confidential Information

Except as required by law, Contractor shall not use or disclose, either before, during or after the Term, any proprietary or confidential information, including, but not limited to, applications, business bids, business plans, economic development analyses, computer programs, databases and all materials furnished to Contractor by the MSF or the MEDC (collectively, "Confidential Information") without the prior written consent of the MSF or the MEDC, except to the extent necessary to perform services on the MSF or MEDC's behalf. Confidential Information does not include:

- (i) information obtained by Contractor from third party sources;
- (ii) that is already in the possession of, or is independently developed by, Contractor;
- (iii) that becomes publicly available other than through breach of this subsection; or

- (iv) is released with the prior written consent of the governmental entity or entities that provided the Confidential Information to Contractor.

Contractor acknowledges that all information provided by the MSF or the MEDC in connection with Contractor's duties under this Agreement shall be treated as Confidential Information unless otherwise stated in this subsection.

M) Conflict of Interest

Except as has been disclosed to the MSF or the MEDC, Contractor affirms that neither the Contractor nor its affiliates or their employees has, shall have, or shall acquire any contractual, financial business or other interest, direct or indirect, that would conflict in any manner with Contractor's performance of its obligations under this Agreement or otherwise create the appearance of impropriety with respect to this Agreement.

Contractor further affirms that neither Contractor nor any affiliates or their employees has accepted or shall accept anything of value based on an understanding that the actions of the Contractor or its affiliates or either's employees on behalf of the MSF or the MEDC would be influenced. Contractor shall not attempt to influence any MEDC or MSF employee by the direct or indirect offer of anything of value. Contractor also affirms that neither Contractor nor its affiliates or their employees has paid or agreed to pay any person, other than bona fide employees and consultants working solely for Contractor or its affiliate, any fee, commission, percentage, brokerage fee, gift or any other consideration contingent upon or resulting from the execution of this Agreement.

In the event of a change in either the interests or services under this Agreement, Contractor will inform the MSF or the MEDC regarding possible conflicts of interest that may arise as a result of such change. Contractor agrees that conflicts of interest shall be resolved to the MSF's or the MEDC's satisfaction or the MSF may terminate this Agreement. As used in this subsection, "conflict of interest" shall include, but not be limited to, conflicts of interest that are defined under the laws of the State of Michigan.

N) Representations of Contractor

Contractor affirms to the best of its knowledge that it or its owners:

- 1) do not have any criminal convictions;
- 2) are not subjects of any pending criminal investigation;
- 3) are not subjects of any past, present or pending investigations by the Internal Revenue Service or any other federal, state, local taxing authority, or court;
- 4) are not subjects of any past, pending or present litigation regarding its conduct; and
- 5) are not in material default or breach of any contract or agreement that it may have with the State of Michigan, the MSF or any other public body.

Contractor further represents and warrants that it has not been a party to any contract with the State, the MSF or other public body that was terminated within the previous five (5) years due to the Contractor's failure to perform or otherwise breached an obligation of such contract.

O) **State of Michigan Competitors**

Any information or knowledge Contractor gains during the course of this Agreement concerning the economic development efforts of the State of Michigan, the MSF, the MEDC or the business conditions or business community in Michigan shall not be disclosed to any public or private party, sovereign authority or foreign government, during the Term and for a period of two (2) years after the later of the Ending Date, the effective date of termination of this Agreement or so long as any information remains confidential pursuant to any contract, law, treaty, resolution or other enforceable promise.

P) **Irreparable Injury**

Contractor acknowledges that if it breaches any of its obligations under subsections L or O, it will cause damages of an irreparable and continuing nature to the MSF, for which money damages alone will not provide adequate relief. Therefore, in addition to all appropriate monetary damages, the MSF is entitled to obtain injunctive relief, including, but not limited to, a temporary restraining order to prohibit the Contractor's continuing breach. The MSF shall have the right to obtain such relief without having to post any bond or other surety.

Q) **Indemnification and Contractor Liability Insurance**

Contractor shall indemnify, defend, and hold harmless the MSF, its Board and its employees, and the MEDC, its Executive Committee, its Corporate Board of Directors, and its employees (the "Indemnified Parties") from any and all liability arising out of or in any way related to Contractor's performance under this Agreement, including any liability resulting from any acts of Contractor's employees or agents.

Contractor shall purchase and maintain such insurance to protect the Indemnified Parties from claims that might arise out of or as a result of Contractor's operations. Contractor will provide and maintain its own errors and omissions liability insurance for Contractor's indemnification obligation under this Agreement. The insurance shall be written for not less than One Million Dollars (\$1,000,000) of coverage, but Contractor's indemnification obligation is not limited to this amount.

R) **Total Agreement**

This Agreement, together with Exhibit A, contains the entire agreement between the Parties superseding any prior or concurrent agreements as to the services being provided and no oral or written terms or conditions which are not contained in this Agreement shall be binding. This Agreement may not be changed except by written agreement signed by the Parties.

S) **Assignment/Transfer/Subcontracting**

Contractor shall not assign, transfer, convey, subcontract, or otherwise dispose of any duties or rights under this Agreement without the prior specific written consent of the MSF. Contractor agrees that any of Contractor's future successors or subcontractors will be bound by the provisions of this Agreement, unless the MSF otherwise agrees in a specific written consent. The MSF reserves the right to approve subcontractors for this Agreement and to require Contractor to replace subcontractors who are found to be unacceptable to the MSF or the MEDC.

T) **Non-Discrimination and Unfair Labor Practices**

In connection with this Agreement, Contractor shall comply with the Elliott-Larsen Civil Rights Act, 1976 PA 453, MCL 37.2101 *et seq.*, the Persons with Disabilities Civil Rights Act, 1976 PA 220, MCL 37.1101 *et seq.*, and all other federal, state and local fair employment practices and equal opportunity laws and covenants that it shall not discriminate against any employee or applicant for employment with respect to his or her hire, tenure, terms, conditions, privileges of employment, or any matter directly or indirectly related to employment because of his or her race, religion, color, national origin, age, gender, height, weight, marital status, or physical or mental disability unrelated to the individual's ability to perform the duties of a particular job or position. Contractor further agrees that every subcontract entered into in connection with this Agreement will contain a provision requiring nondiscrimination in employment, as required in this Agreement, binding upon each subcontractor.

Pursuant to 1980 PA 278, State Contracts with Certain Employees Prohibited Act (the "Act"), MCL 423.321 *et seq.*, the State shall not award a contract or subcontract to an employer whose name appears in the current register of employers failing to correct an unfair labor practice compiled by the United States National Labor Relations Board. Contractor, in relation to this Agreement, shall not enter into a contract with a subcontractor, manufacturer, or supplier whose name appears on this register. Pursuant to section 4 of the Act, the MSF may void this Agreement if, after the Starting Date, the name of the Contractor as an employer or the name of the subcontractor, manufacturer or supplier of Contractor appears on the register.

A breach of this subsection constitutes a material breach of this Agreement.

U) **Jurisdiction**

The laws of the State of Michigan shall govern this Agreement. The Parties shall make a good faith effort to resolve any controversies that arise regarding this Agreement. If a controversy cannot be resolved, the Parties agree that any legal actions concerning this Agreement shall be brought in the Ingham County Circuit Court in Ingham County, Michigan, USA. By signing this Agreement, Contractor acknowledges that it is subject to the jurisdiction of this court and agrees to service by first class or express delivery wherever Contractor resides, in or outside of the United States.

V) **Compliance with Laws**

Contractor shall comply with all applicable state, federal and local laws and ordinances in

providing the services under this Agreement.

W) **No Partnership or Agency Relationship**

This Agreement does not create a partnership relationship. Further, neither Contractor nor Contractor's employees or other representatives shall hold themselves out to third parties as an agent or representative of the State of Michigan, the MSF or the MEDC nor shall they have any authority to take any action or enter into any agreement on behalf of the State of Michigan, the MSF or the MEDC.

X) **No Third Party Beneficiaries**

There are no expressed or implied third party beneficiaries to this Agreement.

Y) **Counterparts**

This Agreement may be executed in one or more counterparts and by facsimile, each of which shall constitute an original, and all of which together shall constitute one and the same instrument.

Z) **Reimbursement**

If this Agreement is terminated as a result of the misuse of funds as reasonably determined by the MSF, MSF shall have no further obligation to make any payments to Contractor. Furthermore, Contractor shall reimburse MSF for payments which were expended for purposes other than those described in this Agreement, as well as any funds that were previously disbursed under this Agreement but not yet expended by Contractor.

AA) **Severability**

All of the clauses of this Agreement are distinct and severable and, if any clause shall be deemed illegal, void or unenforceable, it shall not affect the validity, legality or enforceability of any other clause or provision of this Agreement. To the extent possible, the illegal, void or unenforceable provision shall be revised to the extent required to render the Agreement enforceable and valid, and to the fullest extent possible, the rights and responsibilities of the Parties shall be interpreted and enforced to preserve the Agreement and the intent of the Parties. Provided, if application of this section should materially and adversely alter or affect a Party's rights or obligations under this Agreement, the Parties agree to negotiate in good faith to develop a structure that is as nearly the same structure as the original Agreement (as may be amended from time to time) without regard to such invalidity, illegality or unenforceability.

BB) Publicity

At the request and expense of the MSF or the MEDC, the Contractor will cooperate with the MSF or the MEDC to promote the Scope of Work through one or more of the placement of a sign, plaque, media coverage or other public presentation at the project or other location acceptable to the Parties.

CC) Survival

The terms and conditions of sections III, V(B), V(E), V(F), V(G), V(H), V(I), V(L), V(O), V(P), V(Q), V(S), V(U), V(W), V(X), V(Z) and V(AA) shall survive termination of this Agreement.

The signatories below warrant that they are empowered to enter into this Agreement.

CONTRACTOR ACCEPTANCE:

CONTRACTOR

Dated: _____

By: Authorized Signer
Its: Title

MSF ACCEPTANCE:

Michigan Strategic Fund

Dated: _____

By: Authorized Signer
Its: Title

ATTACHMENT B

**INDEPENDENT PRICE DETERMINATION AND
PRICES HELD FIRM CERTIFICATION**

INDEPENDENT PRICE DETERMINATION

By submission of a proposal, the Bidder certifies, and in the case of a joint proposal, each party thereto certifies as to its own organization, that in connection with this proposal:

1. The prices in the proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition as to any matter relating to such prices with any other Bidder or with any competitor;
2. Unless otherwise required by law, the prices which have been quoted in the proposal have not been knowingly disclosed by the Bidder and will not knowingly be disclosed by the Bidder prior to award directly or indirectly to any other Bidder or to any competitor; and
3. No attempt has been made or will be made by the Bidder to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.

Each person signing the proposal certifies that she/he:

- A) Is the person in the Bidder's organization responsible within that organization for the decision as to the prices being offered in the proposal and has not participated (and will not participate) in any action contrary to 1, 2, and 3 above; or
- B) Is not the person in the Bidder's organization responsible within that organization for the decision as to the prices being offered in the proposal but has been authorized, in writing, to act as agent for the persons responsible for such decision in certifying that such persons have not participated (and will not participate) in any action contrary to 1, 2, and 3 above.

A proposal will not be considered for award if this Attachment B has been altered so as to delete or modify 1 or 3, above. If 2, above, has been modified or deleted, the proposal will not be considered for award unless the Bidder provides, with this Attachment B, a signed statement which sets forth, in detail, the circumstances of the disclosure and the MEDC determines that such disclosure was not made for the purpose of restricting competition.

PRICES HELD FIRM

LENGTH OF TIME PRICES ARE TO BE HELD FIRM: All rates quoted in bidder's response to this RFP will be firm for the duration of the Contract. No price changes will be permitted.

Signed _____

Date _____