

REQUEST FOR PROPOSALS
MICHIGAN STRATEGIC FUND
INDUSTRY 4.0 IMPLEMENTATION
RFP-CASE-345425

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:

- Proposals (Section II-A);
- Conflicts of Interest Disclosure (if applicable) (Section II-G); and
- Additional Certification (Section III-P)

APPLICANTS ARE RESPONSIBLE FOR ASSURING THAT THE FOLLOWING IDENTIFYING INFORMATION APPEARS IN THE SUBJECT LINE OF YOUR EMAIL: “RFP-CASE-345425 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 Applicants or their representatives. Applicant’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

- **February 9, 2022, at 3:00 p.m.:** Questions from potential Applicants 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.
- **February 16, 2022, by close of business:** Responses to all qualifying questions will be posted on the MSF’s website, <https://www.michiganbusiness.org/345425>.
- **February 28, 2022, at 3:00 p.m.:** Electronic version(s) sent of your Proposal 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
INDUSTRY 4.0 IMPLEMENTATION
RFP-CASE-345425

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 Applicants or their representatives. Applicant’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 MSF is seeking proposals from one or more Michigan-based non-profit entities and/or Michigan-based governmental entities to support the MEDC with grant administration for Industry 4.0 (I4.0) technology implementation projects for Michigan small manufacturers throughout the state.

B) BACKGROUND STATEMENT AND OBJECTIVES

Background:

During the development of the MEDC's strategic plan in 2019, Advanced Manufacturing was identified as a strategic focus industry for the state of Michigan. I4.0 adoption is identified as a key component to build resiliency of the manufacturing industry within the state of Michigan.

On December 8, 2020, MSF approved \$5,550,000 in funding to support the statewide Industry 4.0 Initiative with the mission to ensure that 50% of Michigan small and medium-sized manufacturers (6,200 businesses) will be prepared to adopt I4.0 technologies by 2025. This included statewide services provided by the Michigan Manufacturing Technology Center ("MMTC") and Automation Alley, 10 regional awardees and a statewide awareness campaign.

In the first year of the initiative, the initial goal of 1,200 businesses served was exceeded and the program ended the fiscal year with 1,471 individual businesses reached by the initiative. Additionally, I4.0 individual engagements totaled 3,682, including nearly 2000 participants in outreach events and webinars, 616 attendees in the MMTC Technology Roadshows, 559 companies registered for an essential membership from Automation Alley and 150 companies received an in-depth assessment from MMTC.

As approved by MSF on December 7, 2021, MEDC will continue working to increase awareness of I4.0 and digitization in the manufacturing industry and will provide statewide resources via MMTC and Automation Alley for year two of the initiative.

Based on first year feedback from the statewide and regional service providers, cost remains one of the biggest barriers for small and medium-sized manufacturers to adopt I4.0 technologies. To support companies with this investment, it is the MEDC's intent to identify and grant awards to one or more entities to administer implementation matching grants for companies looking to purchase a qualifying I4.0 technology. Additionally, the awardee(s) will promote the statewide I4.0 Signature Initiative and Services and will drive activity to existing tools.

Objectives:

1. Increase I4.0 awareness and preparedness throughout Michigan via support of statewide programming and activities provided by MMTC and Automation Alley.

2. Increase I4.0 technology adoption throughout Michigan via administration and execution of I4.0 implementation grants.

C) QUALIFICATIONS

The MEDC is seeking proposals from Michigan-based non-profit entities and Michigan-based governmental entities that are currently engaged in and have prior experience with economic development activities, to include (but not limited to) cities, townships, counties, communities, chambers of commerce or other regional economic development entities, universities and incubators or accelerators.

Successful respondents will be able to:

- State and describe the geographic region within Michigan in which programming will be provided;
- Describe how the respondent proposes to promote statewide I4.0 services provided by the MMTC and Automation Alley;
- Describe how the respondent proposes to recruit companies to participate in regional roundtable(s);
- Describe how the respondent proposes to reach qualifying Michigan small manufacturers for the I4.0 technology implementation grant program;
- Describe how the respondent will verify purchase of technology and reimburse up to 50% of actual costs;
- Demonstrate prior experience in administering financial grants to businesses;
- Demonstrate prior; experience with economic development activities;
- Demonstrate collaboration with a local EDO (if a local EDO is not the applicant);
- Demonstrate collaboration with Michigan Manufacturing Technology Center and Automation Alley; and
- Demonstrate prior experience engaging with and/or assisting businesses in relation to I4.0.

Funding levels will be determined based on the number of small manufacturing establishments within identified regions of coverage.

Administrative fees cannot exceed 15% of overall award. The remaining 85% should be allocated directly to qualifying Michigan manufacturers through individual implementation grants.

D) DELIVERABLES

Deliverables to be provided by the selected vendor include:

1. Increase I4.0 awareness and preparedness throughout Michigan via support of statewide programming and activities.
 - a. Promote existing statewide I4.0 resources including but not limited to Technology Roadshows, Course Trainings, MMTC Assessments, Automation Alley's Essential Membership, I4.0 events including Integr8, educational materials, I4.0 Leadership Evaluation, and other I4.0 programming supported by this initiative.

- b. Execute one regional roundtable in partnership with Automation Alley for each region of proposed coverage. All [10 regions](#) of the state should host one in-person, hybrid and/or virtual event. Awardee(s) are expected to promote the event, recruit companies from the region to participate and coordinate logistics.
2. Increase I4.0 technology adoption throughout Michigan via administration and execution of I4.0 implementation grants.
 - a. Administer I4.0 implementation grants to small Michigan manufacturers. Awardees will be expected to identify and recruit qualified Michigan manufacturers to participate in the grant program and disburse funds to businesses.

Initial requirements of the I4.0 implementation grant program include, but are not limited to:

- Companies must complete an I4.0 Technology Assessment by the MMTTC prior to award;
 - Technologies eligible for this grant program include hardware/software related to the following I4.0 categories, and preference will be given to transformative technologies (denoted with an asterisk [*] below):
 - Additive Manufacturing & Advanced Materials*
 - Artificial Intelligence*
 - Big Data
 - Cloud Computing
 - Cybersecurity
 - Industrial Internet of Things (IoT)
 - Modeling, Simulation, Visualization & Immersion
 - Robotics/Automation*;
 - Companies must be classified as a small business by the Small Business Administration – <https://www.sba.gov/federal-contracting/contracting-guide/size-standards>;
 - Grants will be reimbursement based and will cover up to 50% of actual expenses incurred. Companies are required to cover the remaining cost of the technology project and cannot be combined with any other grant programs or external funding sources; and
 - Financial awards may not exceed \$25,000 per company.
3. Provide quarterly reporting on deliverables, grant progress, companies served for each three-month quarter of a 12-month grant period of performance. Exact reporting requirements and forms will be provided upon award.

Additional Information:

Successful respondents will provide a Program Manager to work as the primary point of contact with the MEDC, their Contractors and additional stakeholders. As a part of its project management duties, the Program Manager will conduct informational and status meetings. Such meetings may include the Program Management Team, the MEDC, other consultants, elected officials, and other stakeholders as designed by the MEDC. The Program Manager will work directly with the MEDC and their Contractors and related stakeholders to define,

manage, and control the project scope, timeline, issue escalation and resolution processes. The MEDC will require detailed status reports, as defined by the MEDC, on a quarterly basis and will reserve the option of changing that requirement dependent upon which phase the project is in. In addition, the Program Manager will create and routinely update the project plan to reflect changes in the nature and timing of project activities with all changes being subject to MEDC approval.

SECTION II PROPOSAL FORMAT

To be considered, each Applicant must submit a COMPLETE proposal in response to this RFP using the format specified. Applicant'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 Applicant to be essential to a complete understanding of the proposal. Each section of the proposal should be clearly identified with appropriate headings:

A) PROPOSAL FORMAT

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

6. Project Staffing – The Applicant 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 Applicant's Project Manager and other key individuals. Do not include any financials for the contemplated work within the 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. Track Record of Collaboration – Describe the relationship(s) and past collaboration(s) of your organization with manufacturing support entities such as the MMTC, Automation Alley, and/or other economic development entities in Michigan on executing similar initiatives and/or programs.
8. 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.
9. Applicant’s Authorized Expediter – Include the name and telephone number of person(s) in your organization authorized to expedite any proposed contract with the MSF.
10. Additional Information and Comments – Include any other information that is believed to be pertinent, but not specifically asked for elsewhere.

B) PROPOSAL SUBMITTAL

Submit electronic versions of your Proposal to the MSF via email to contractsandgrants@michigan.org no later than **3:00 p.m. on** February 28, 2022. 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.**

APPLICANTS ARE RESPONSIBLE FOR ASSURING THAT THE FOLLOWING IDENTIFYING INFORMATION APPEARS IN THE SUBJECT LINE OF YOUR EMAIL: “*RFP-CASE-345425 Proposal*” and with *Applicant 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 Applicants concerning the specifications in this RFP must be received via e-mail no later than **3:00 pm on February 9, 2022**. Questions must be submitted to:

Contract Services
contractsandgrants@michigan.org

B) PROPOSALS

To be considered, Applicants must submit a complete response to this RFP, using the format provided in Section II of this RFP, by **3:00 p.m. on February 28, 2022**. No other distribution of proposals is to be made by the Applicant.

The Proposal must be **signed physically or electronically** by an official of the Applicant authorized to bind the Applicant to its provisions.

C) ECONOMY OF PREPARATION

Each proposal should be prepared simply and economically, providing a straightforward, concise description of the Applicant'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 multi-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.
 - Proposal signed physically or electronically by an official of the Applicant authorized to bind the Applicant to its provisions.
 - Proposals satisfy the form and content requirements of this RFP.

2) Step II – Criteria for Satisfactory 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

Applicant.

- b.) *Competence, Experience and Staffing Capacity* – The proposal should indicate the ability of the Applicant 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 Applicant 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 Applicant’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.	Applicant Information	5
2.	Understanding the RFP	10
3.	Statement of Work	25
4.	Prior Experience	25
5.	Staffing	15
6.	Track Record of Collaboration	20
TOTAL		100

- c.) During the JEC’s review, Applicants may be required to make oral presentations of their proposals to the JEC. These presentations provide an opportunity for the Applicants 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 proposal evaluation will have their pricing evaluated to be considered for award.

E) APPLICANTS COSTS

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

F) TAXES

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

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

G) CONFLICT OF INTEREST

The Applicant 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 Applicant affirms that to the best of its knowledge there exists no actual or potential conflict between the Applicant, the Applicant’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 Applicant 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 Applicant 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 Applicant'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 Applicant 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 Applicant's proposal, Applicant 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, Applicant 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 Applicant failed to perform or otherwise breached an obligation of such contract.

I) DISCLOSURE OF LITIGATION

Except as otherwise disclosed in an exhibit to Applicant's proposal, there is no criminal litigation, investigations or proceedings involving the Applicant (and each subcontractor, if subcontractors will be used to provide the goods/services requested under this RFP) or any of the Applicant's officers or directors or any litigation or proceedings under the Sarbanes-Oxley Act. In addition, Applicants must disclose in the exhibit requested under this Section of the RFP any civil litigation, arbitration or proceeding to which the Applicant (or, to the extent Applicant 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 Applicant (or subcontractor); or (2) a claim or written allegation of fraud or breach of contract against Applicant (or, to the extent Applicant 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 Applicant is prevented from disclosing under the terms of the settlement may be annotated as such. Applicants 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 an Applicant purposefully or willfully submitted false information in response to this RFP, the Applicant will not be considered for an award and any resulting Contract

that may have been executed may be terminated.

K) ADDITIONAL DISCLOSURE

All Applicants 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 Applicants’ proposals. Applicants, however, are encouraged to provide sufficient information to enable the MSF to determine the Applicant’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) 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 <https://www.michiganbusiness.org/345425>. Applicants are encouraged to regularly check this site for changes or other information related to the RFP.

M) ELECTRONIC PROPOSAL RECEIPT

ELECTRONIC VERSIONS OF YOUR PROPOSAL MUST BE RECEIVED AND TIME-STAMPED BY THE MSF TO contractsandgrants@michigan.org, ON OR BEFORE **3:00 p.m. on February 28, 2022**. Applicants 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.

N) 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 application process or in any proposal;
- 3) rebid the project;
- 4) negotiate with any Applicant for a reduced award, or for an increased award to include any alternates that the Applicant may propose;
- 5) reduce the scope of the project, and rebid or negotiate with any Applicant 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.

O) 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.

P) 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.

Applicants **must** include the following certification in their proposal:

“Applicant 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 Grant Agreement (the "Agreement")
- 2) Term of Work – It is estimated that the activities in the proposed Agreement will cover the period June 1, 2022, through May 31, 2023. 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 grant activities during the course of the Agreement. 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 Applicant resulting from the requested changes are subject to acceptance by the MSF. Changes may be increases or decreases.
- 4) Subcontracting – The MSF reserves the right to approve any subcontractors for the Contract and to require the Applicant, upon award of the Agreement, to replace subcontractors that the MSF finds to be unacceptable.
- 5) Award of Grant – 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 Agreement considering requested award amount, value and quality of the proposals.

B) GRANTEE RESPONSIBILITIES

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

C) ACCEPTANCE OF PROPOSAL CONTENT

If awarded an Agreement, 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 Agreement.

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

D) PROJECT CONTROL AND REPORTS

1) Project Control

- a) The selected Applicant (the “Grantee”) will carry out this project under the direction and control of the MSF.
- b) The MSF will appoint a Grant Manager for this project. Although there will be continuous liaison with the Grantee’s team, the Grant Manager will meet with the Grantee's project manager for the purpose of reviewing progress and providing necessary guidance to the Grantee in solving problems which arise.
- c) The Grantee will submit periodic 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 Grantee Manager and notification of any significant deviation from previously agreed upon work plans.