

# REQUEST FOR PROPOSALS

**Quantitative Analysis: African American & Latino Homeownership in Wisconsin**

THIS IS NOT AN ORDER



## Proposals Due Date

**October 29, 2020, 2:00 p.m. CT**

All questions relating to this Request For Proposals must be submitted in writing to:  
Procurement Manager  
201 West Washington Avenue, Suite 700  
Madison, Wisconsin 53703  
[procurement@wheda.com](mailto:procurement@wheda.com)

## Calendar of Events

September 25, 2020  
October 15, 2020, 2:00 p.m. CT  
**October 29, 2:00 p.m. CT**

RFP Issuance  
Deadline for Submitting Written Questions  
**Proposals Due Date**

## Proposer Name and Address (must be completed)

**Check all boxes at left that apply below** for minority-owned, disabled veteran-owned and woman-owned business designations for Proposer. For more information see <https://wisdp.wi.gov/>.

### WISCONSIN DEPARTMENT OF ADMINISTRATION-CERTIFIED MINORITY-OWNED BUSINESS ENTERPRISE (MBE).

- DOA-Certified** MBE under Chapter 16, WI Statutes.  Over 50% minority ownership and not DOA certified.

### WISCONSIN DEPARTMENT OF ADMINISTRATION-CERTIFIED DISABLED VETERAN-OWNED BUSINESS (DVB).

- DOA-Certified** DVB under Chapter 16, WI Statutes.  Over 50% disabled-veteran ownership and not DOA certified.

### WISCONSIN DEPARTMENT OF ADMINISTRATION-CERTIFIED WOMAN-OWNED BUSINESS ENTERPRISE (WBE).

- DOA-Certified** WBE under Chapter 16, WI Statutes.  Over 50% woman ownership and not DOA certified.

**ACKNOWLEDGEMENT OF ANY ADDENDA and/or REVISIONS:** In signing this document, Proposer acknowledges and affirms that its Proposal complies with all terms, conditions and specifications of this RFP and any addenda, appendices or revisions thereto. If awarded a Contract, Proposer will comply with all terms of its Proposal and all terms, conditions and specifications of this RFP and any addenda or revisions thereto.

**DEBARMENT AND SUSPENSION:** In signing this document, Proposer acknowledges it has not been suspended, debarred, declared ineligible or voluntarily excluded from eligibility by any federal or state department or agency.

**NON-COLLUSION:** In signing this document, Proposer certifies it has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a Proposal; that this Proposal has been independently arrived at without collusion with any other Proposer, competitor or potential competitor; that this Proposal has not been knowingly disclosed prior to the opening of Proposals to any other Proposer or competitor; that the above statement is true and accurate.

**Name of Authorized Company Representative (Type or Print)**

**Title**

**Date**

<b>Signature of Authorized Company Representative Named Above</b>	<b>Phone</b>	<b>Fax</b>	<b>Email</b>
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## CHECKLIST FOR SUBMITTING A PROPOSAL

### Understanding the Request for Proposals (RFP)

- Thoroughly read and review this RFP and all attachments, appendices, addenda, and/or revisions.
- Submit any written questions to the Procurement Manager by the deadline provided in the Calendar of Events.
- Know when and where the Proposal is to be delivered and the due date and time for submission.

### Completing Your Proposal

- Complete the narrative information required in Section 5 of the RFP.
- Complete the Cost Sheet provided with the RFP. Make sure your prices and calculations are accurate. Do not alter the format of the Cost Sheet.
- Complete the Proposer Information Form provided with the RFP.
- Complete the Proposer Reference Form provided with the RFP.
- Complete and sign the Request for Proposals sheet provided as the cover page of this RFP package.
- This checklist is provided for the Proposer's convenience only and is not required to be submitted with the Proposal package.

### Submitting Your Proposal

- Prepare an email to include the following attachments.
  1. **Signed Request for Proposals Sheet** (RFP cover page)
  2. **Proposer Information Form** (Attachment 1)
  3. **Proposer Reference Form** (Attachment 2)
  4. **Narrative Response** (see Section 5 for details)
- Provide a Cost Sheet (Attachment 3) separately in the file types required herein.
- Provide reference examples of previous research work undertaken and associated products and output.

### If Your Proposal is Chosen for a Contract Award:

- Be prepared to provide any documents—such as certificates of insurance, licenses, credentials, or IRS Form W-9 (Request for Taxpayer Identification Number)—as required by the Authority.
- For Proposers using DOA-certified MBE or DOA-certified DVB subcontractors, related documents such as itemized invoices and service detail may be required.

# 1. INTRODUCTION

## 1.1. Scope

The purpose of this Request for Proposals (RFP) is to provide interested parties with information needed to prepare and submit a Proposal for the following:

### **Problem Statement and Background**

Access to homeownership in communities of color remains a significant challenge in our state. While nationally African American and Latino households have very different experiences in their access to homeownership, both continue to fall behind homeownership percentages of White households. In Wisconsin, these disparities are even more significant, with only 23 percent of African American households and 46 percent of Latino households owning their own home. Further, the global COVID-19 pandemic has had devastating economic implications across Wisconsin, with major implications for communities of color.

### **Goal**

The goal of this initiative is to build a data-driven understanding of African American and Latino households and their experience with homeownership in Wisconsin. In doing so, this work will inform future strategy and increase impact for WHEDA, as well as its peer agencies and related industries.

### **Project Description**

Guided by the annual NAREB State of Housing in Black America report, WHEDA is seeking Proposals from research entities who have the capacity to collect, analyze, synthesis, and produce a final report focused on the state of homeownership for African American and Latino Households in Wisconsin. Proposals are expected to describe a research effort that can realistically be accomplished as expeditiously as possible. Proposals must present the bidders' current thinking in sufficient detail to demonstrate their understanding of the problem and the soundness of their approach for conducting research required.

### **Objectives**

- Basic Elements
  - Conduct quantitative research and analysis surrounding the questions outlined in the research plan below.
  - Produce a series of recommendations based on research outcomes.
  - Produce final report on the state of African American and Latino homeownership in Wisconsin.
  - Incorporate independent analysis of Mortgage Ready Methodology provided by Freddie Mac Single Family into final analysis.<sup>1</sup>
  - Establish points of connection and communication with the qualitative researcher selected by WHEDA, which is engaged in developing a tangential research plan.
- Additional Analysis
  - Additional analysis which the Proposer feels could complement the basic elements outlined above to further WHEDA's overarching initiative intentions to inform and deliver testable solutions, and enhance product development and program design.
- Post-production
  - Communicate and visualize findings for a diverse audience, including internal WHEDA staff; public, private-sector stakeholders; and those impacted by the problem statement. For example:
    - Copy editing graphic design necessary to assemble the final report
    - Data visualization, i.e., interactive mapping, graphics

- Website development

## Research Plan

In addition to the project description and objectives, Proposals should include a plan for address the questions below. The scope of these questions is not limited, but can serve as a guide for Proposers.

1.) What is the state of African American and Latino homeownership in Wisconsin in 2020, viewed through a post-pandemic lens?

- Homeownership rates
  - Historical rates by Race and Ethnicity
  - Comparison of current rates by Race and Ethnicity
- Loan Characteristics
  - Loan Applications
  - Loan Originations
  - Loan Denial Rates by Race and Ethnicity
  - Loan Delinquency Rates by Race and Ethnicity
  - Loan Approval Rates by Race and Ethnicity
- Lenders Characteristics
  - Loan and Lender Channels by Race and Ethnicity
  - Applications by Lender Type, Applicant Income, Race and Ethnicity
- Applicant Characteristics
  - Loan Type, Geographic Patterns and Race
  - Cities/Communities with Largest African American and Latino Populations and Levels of Segregation
  - Mortgage Lending and Gender
  - Mortgage Lending and Age
- Market Characteristics
  - GSE trends of tightened underwriting standards, and impact on low to moderate buyers of color
  - Mortgage Credit Availability
  - Fannie Mae, Freddie Mac and FHA Pricing
  - Credit Scoring and Related Risk Assessment Modifications
- Geographic characteristics
  - Nuances between urban and rural communities and how they are impacted by the problem statement
  - Detailed analysis of top metros in the state

2.) Rental affordability and its impact on the homeownership pipeline

- The degree to which rental costs across the state impact African American and Latino households in their ability to save up for homeownership costs, i.e., down payment.
- The disparities between rental costs compared to the monthly cost of a mortgage across the state.

3.) To the extent that we are able to understand at this moment, what long-range implications will the current and post-pandemic landscape have on African American and Latino homeownership rates in the state?

- Housing market and affordability implications
- Impacts for current homeowners, ie. foreclosure, property maintenance

- What can we learn from the 2008-2009 recession within this context?

4.) How are the above questions impacted across homeownership status, i.e., how does this take shape across: a) those who have bought homes, b) those who are potential homebuyers, and c) those not interested or who feel unable to purchase?

The Authority intends to use the results of this process to award one or more Contracts to provide the products and/or services described in this RFP. The Authority's preference is to award one contract to one provider who proposes a complete solution; however, providers are not precluded from partnering to provide a comprehensive Proposal should their team be unable to provide a comprehensive solution alone.

## 1.2. Wisconsin Housing and Economic Development Authority

The Wisconsin Housing and Economic Development Authority is a public body corporate and politic governed by Chapter 234 of the Wisconsin Statutes. The Authority is governed by a twelve-member Board of Directors. The Authority's Executive Director and Chief Executive Officer is appointed by the Governor. The Authority offers financial products and services to Wisconsin citizens, housing developers, business owners and farmers for affordable housing and economic development opportunities.

As of June 30, 2019, the Authority had 157 employees, an operating budget of \$24.2 million, and \$2.9 billion in assets. Revenues to finance its operating and capital budgets are derived primarily from interest earnings on loans, investments of assets, and administrative fees.

For more information about the Authority, including the Authority's 2019 audited financial statements please visit [www.wheda.com](http://www.wheda.com).

## 1.3. Definitions

Words and terms in this RFP shall be given their ordinary and usual meanings, and all meanings shall be applicable to the singular and plural forms of the words and terms. For the purposes of this RFP, the following words and terms shall have the meanings indicated:

- A. **"Authority"** means the Wisconsin Housing and Economic Development Authority.
- B. **"Calendar of Events"** means the official schedule of events, and deadlines shown on the cover page of this RFP.
- C. **"Contract"** means a contract entered into between the Authority and a successful Proposer resulting from the selection of its Proposal.
- D. **"Contractor"** means a Proposer that is awarded a Contract under this RFP.
- E. **"DVB"** means a Disabled Veteran-Owned Business (DVB) certified by the Department of Administration under Chapter 16, Wisconsin Statutes.
- F. **"Highest Scoring Proposer"** means the Proposer that meets the conditions and specifications of this RFP and whose Proposal receives the highest number of points through the evaluation process described in this RFP.
- G. **"Interested Proposer"** means any individual, company, corporation or other entity identified by the Procurement Manager as potentially interested in this RFP or that notifies the Procurement Manager of its interest in or intent to respond to this RFP.
- H. **"MBE"** means a Minority-Owned Business Enterprise (MBE) certified by the Department of Administration under Chapter 16, Wisconsin Statutes.
- I. **"Procurement Manager"** means the person who has been designated by the Authority to manage this RFP. All communications with the Procurement Manager shall be through

electronic mail addressed to [procurement@wheda.com](mailto:procurement@wheda.com).

- J. **“Proposal”** means the complete response from a Proposer, including all required documentation described in this RFP.
- K. **“Proposer”** means the individual, company, corporation or other entity that responds to this RFP.
- L. **“Request for Proposals” or “RFP”** means this document including appendices, addenda, revisions and/or attachments.
- M. **“WBE”** means a Woman-Owned Business Enterprise (WBE) certified by the Department of Administration under Chapter 16, Wisconsin Statutes.

## **2. CONTRACT INFORMATION**

### **2.1. Contract Term**

The Contract will be in effect for the period necessary to complete the work contracted for, with an initial maximum term of one year. A Contract may be renewed for additional month-to-month periods by mutual consent.

### **2.2 Terms and Conditions**

In addition to the terms, conditions and specifications contained in this RFP, this RFP and any resulting Contract(s) shall be governed by the Authority’s Standard Terms and Conditions for Contractual Services (Attachment 4) (the “Terms and Conditions”), which includes the Authority’s Code of Ethics for Consultants and Travel Policy for Consultants. This RFP and the awarded Proposer’s Proposal may, at the Authority’s option, be incorporated into the Contract.

Proposers must accept the terms and conditions referenced above in their entirety or submit point-by-point exceptions along with proposed alternative or additional language for each exception. The Authority may reject a Proposal if it deems the proposed alternative or additional language to be unacceptable. Submission of the Proposer’s own terms and conditions as a substitute for language in the Terms and Conditions is not a sufficient response to this requirement and may result in rejection of the Proposal. Failure of a successful Proposer to accept the Authority’s Terms and Conditions as part of the contract or to propose alternative or additional language in its Proposal that is acceptable to the Authority, will result in cancellation of the award.

## **3. PROCEDURES AND INSTRUCTIONS**

### **3.1. Reasonable Accommodations**

Upon request, the Authority will provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities.

### **3.2. Proposal Contents and Delivery Requirements**

Proposers shall submit

- A. A pdf file of its Proposal, excluding the Cost Sheet,
- B. A pdf file of its Cost Sheet,
- C. An excel file of its Cost Sheet,

by the Proposals Due Date in the Calendar of Events to  
Procurement Manager  
[procurement@wheda.com](mailto:procurement@wheda.com)

All emailed Proposals must include the following information as an email text message at the top of the email with the attached Proposal information.

- Proposer's name and address
- Request for Proposals title (See upper left-hand box of RFP cover page)
- Proposals due date (See upper left-hand box of RFP cover page and Calendar of Events)

Proposals must be date-and-time-stamped at the email address indicated above on or before the date and time Proposals are due. Late Proposals will be rejected. Proposals dated and time stamped at a different email address will be rejected.

### **3.3. Calendar of Events**

The Calendar of Events provides important dates and times by which actions related to this RFP shall be completed. In the event that the Authority finds it necessary to change any of these dates and/or times, it will provide written notification of such changes per Section 3.4, Communication with Proposers.

### **3.4. Communication with Proposers**

In the event it becomes necessary to make changes to the Calendar of Events, provide additional clarifying data or information, revise any part of this RFP, or provide a record of questions and answers, the Procurement Manager will send written notification, via email and/or U.S. postal mail, in the Authority's discretion, to all Interested Proposers.

### **3.5. Format of Proposal**

Proposers responding to this RFP must submit the following materials.

**A. Signed Request for Proposals Sheet:** The Proposal must include the signed Request for Proposals sheet provided as the cover page of this RFP package. A Proposal submitted in response to this RFP must be signed by the person in the Proposer's organization who is responsible for pricing decisions for the services offered in the Proposal or by a person who has been authorized in writing to act as such person's agent.

**B. Proposer Information Form** (Attachment 1)

**C. Proposer Reference Form** (Attachment 2)

**D. Cost Sheet** (Attachment 3): Provide the original copy Cost Sheet in a sealed envelope with the Proposal package and both as a separate pdf file and as a separate excel file on the USB drive. All costs for furnishing the services requested under this RFP must be included on the Cost Sheet. Please refer to Section 6, Cost, for information on Proposal pricing and price adjustments

**E. Narrative Responses and Additional Information:** Please refer to Section 5 (Mandatory, General and Technical Requirements) and Section 7 (Additional Information Requirements).

The checklist included with this RFP is provided for the convenience of the Proposer. The Proposer is not required to submit the checklist with its Proposal package.

### **3.6. Multiple Proposals**

Multiple Proposals from a Proposer are permitted; however, each Proposal must conform fully to the requirements for each Proposal submission. Each such Proposal shall be submitted separately and labeled as Proposal #1, Proposal #2, etc. on each page included in the response.



### **3.7. Questions**

Questions concerning this RFP must be submitted in writing to the Procurement Manager via email sent to [procurement@wheda.com](mailto:procurement@wheda.com) on or before the Deadline for Submitting Written Questions provided in the Calendar of Events. Proposers are expected to raise any questions, exceptions or additions concerning the RFP (including the Terms and Conditions) prior to this deadline. If a Proposer discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this RFP, the Proposer must immediately notify the Procurement Manager via email sent to [procurement@wheda.com](mailto:procurement@wheda.com) and request clarification and/or modification of the RFP. All questions and answers will be provided to all Proposers in accordance with section 3.4, Communication with Proposers.

### **3.8. Incurring Costs**

The Authority is not liable for any cost incurred by a Proposer in responding to this RFP.

### **3.9. Contact with the Authority**

From the date of issuance of this RFP until a letter of intent to award a Contract is issued, all contacts with the Authority regarding this RFP shall be made only through the Procurement Manager. Any information provided by a source other than the Procurement Manager shall be deemed unofficial and nonbinding on the Authority. Violation of this condition may be considered sufficient cause for rejection of a Proposal, irrespective of any other considerations.

### **3.10. News Releases**

News releases pertaining to the RFP or to the acceptance, rejection or evaluation of a Proposal shall not be made without the prior written approval of the Authority.

## **4. PROPOSAL ACCEPTANCE, VERIFICATION AND AWARD**

### **4.1. Proposals Opening**

Proposals will be opened on the Proposals due date and time specified in the Calendar of Events. Names of the Proposers will not be read aloud at the Proposals opening. The Proposals opening will be held at the following location.

WHEDA  
201 West Washington Avenue, Suite 700  
Madison, Wisconsin

### **4.2. Proposals Review, Verification and Acceptance**

The Authority shall review each Proposal to verify that it meets all specified requirements in this RFP. Proposals that do not comply with instructions contained in this RFP may be rejected by the Authority. The Authority reserves the right to waive a particular specification if no Proposer meets that specification. The Authority may request reports on a Proposer's financial stability. The Authority may reject a Proposal if the Proposer is determined to have inadequate financial means to provide the required service. The Authority retains the right to accept or reject any or all Proposals, or accept or reject any part of a Proposal if doing so is in the best interest of the Authority. The Authority shall be the sole judge as to compliance with the instructions contained in this RFP. A Proposal shall be deemed to be firm for acceptance for ninety (90) days from date of the Proposals opening unless otherwise noted. A Proposer may not modify its Proposal after the Proposals opening except to correct minor omissions or miscalculations as directed in writing by the Procurement Manager.

### **4.3. Minority-Owned and Disabled Veteran-Owned Business Enterprises**

Proposers will receive an additional 10 points on a 100-point scale if using a qualified DOA-certified MBE or a qualified DOA-certified DVB in a subcontractor role for at least 10% of the

contracted work and fees, or will receive an additional 15 points on a 100-point scale if the proposer is a qualified DOA-certified MBE or a qualified DOA-certified DVB and will be completing all work required under the RFP. All DOA-certified MBEs and/or DOA-certified DVBS must be certified by the Department of Administration under Chapter 16 of the Wisconsin Statutes and listed under <https://wisdp.wi.gov/>. Qualified Proposers who have MBE and/or DVB DOA certification(s) are required to check the corresponding box(es) on the RFP cover page to be considered for a point preference. Proposers who hire a qualified DOA-certified MBE or a qualified DOA-certified DVB subcontractor are asked to specify this in their Proposal.

#### **4.4. Proposals Scoring**

Proposals shall be reviewed by an evaluation committee and scored against the stated Evaluation Criteria. The committee may review references, require oral interviews/presentations and use the results of reference checks, interviews and presentations in scoring the Proposals.

#### **4.5. Evaluation Criteria**

The Proposals shall be scored using the following criteria

A. Proposal Requirements (Section 5.1)	<b>30</b>
B. Organization Capabilities (Section 5.2)	<b>10</b>
C. Staff Qualifications (Section 5.3)	<b>10</b>
D. Technical Requirements (Section 5.4)	<b>20</b>
E. Proposals Pricing (Section 6.1)	<b>30</b>
TOTAL	100

A Proposal must receive at least 45 points for Evaluation Criteria A, B, C, and D prior to having the Cost Sheet scored. A Proposal that receives less than the required number of points for these sections shall be ineligible for further consideration.

Please see Section 4.3, Minority-Owned and Disabled Veteran-Owned Business Enterprises, for point preferences granted to qualified DOA-certified MBEs, to qualified DOA-certified DVBS and to Proposers who partner with qualified DOA-certified MBEs and qualified DOA-certified DVBS.

#### **4.6. Method to Score Costs**

Unless documented in its Cost Sheet, a Proposer may not request a price increase during the initial one year term of the Contract.

The following formula shall be used to score the Cost Sheets:

$$\text{Maximum Evaluation Points for Cost} = \frac{\text{Cost of the Proposal with the Lowest Cost}}{\text{Cost of the Proposal Being Scored}} \times \text{Maximum Evaluation Points for Cost}$$

#### **4.7. Best and Final Offer**

The Authority shall compile the final scores (Organizational Capabilities, Staff Qualifications, Technical Requirements and Cost) for each Proposer. The award may be made in one of two ways:

- A. To the highest scoring responsive and responsible Proposer based upon original

Proposals; or

- B. The highest scoring Proposer or Proposers may be requested to submit best and final offers. Best and final offers will be evaluated against the stated criteria, scored and ranked. The award shall then be made to the highest scoring Proposer. However, a Proposer should not expect that the Authority will request a best and final offer.

#### **4.8. Right to Reject Proposals and Negotiate Contract Terms**

The Authority reserves the right to reject any and all Proposals. The Authority may negotiate the terms of the Contract, including the award amount, with the selected Proposer prior to entering into the Contract. If contract negotiations cannot be concluded successfully with the highest scoring Proposer, the Authority may negotiate a Contract with the next highest scoring Proposer.

#### **4.9. Notification of Intent to Award**

All Proposers who respond to this RFP shall be notified in writing of the Authority's intent to award the Contract as a result of this RFP.

### **5. MANDATORY, GENERAL AND TECHNICAL REQUIREMENTS**

The Proposer must provide answers to all the following information requests and questions.

#### **5.1 Proposal Requirements**

##### **A. Basic Elements (to be priced in Cost Sheet #1)**

- The Proposer must provide a detailed proposal outlining their work plan for the basic elements of the scope outlined in section 1.1., specifically as it relates to a reproduction of a report similar to the NAREB State of Housing in Black America report.
  - Describe how you will organize and perform tasks around the content outlined in the scope
  - Describe how you will identify critical milestones and ensure progress
  - Describe how you will manage the Project budget, schedule and scope.
  - Describe how you will ensure quality control.
  - Describe your timeline for the proposal

##### **B. Additional Analysis (to be priced Cost Sheet #2)**

- If relevant, describe any additional analysis which the Proposer will use to complement the basic elements outlined above to further WHEDA's overarching initiative intentions to inform and deliver testable solutions, and enhance product development and program design.

##### **C. Post-production (to be priced Cost Sheet #3)**

- If relevant, describe the Proposer's post-production capacity in communicating and visualizing research findings to a diverse audience, including internal WHEDA staff; public, private sector stakeholders; and those impacted by the problem. For example:
  - Copy editing
  - Graphic design
  - Data visualization, ie. interactive mapping, graphics
  - Website development

#### **5.2. Organizational Capabilities**

- A. Provide a brief description of the Proposer's firm including its areas of specialization,

history, locations and organization.

- B. Describe your firm's capacity and experience in applying a racial equity lens to this work

### **5.3. Staff Qualifications**

- A. Provide the names and resumes for each staff person who will be assigned to work directly with the Authority; each resume must include the qualifications, background and experience of the staff person.
- B. Provide a list of any subcontractors (individual or organizational) that the Proposer intends to use and the services the subcontractors will provide under this RFQ and state whether any of the subcontracting firms are qualified DOA-certified MBEs and/or qualified DOA-certified DVBs. Proposers are not required to use subcontractors. However, no subcontractor may be used without the Authority's written approval.
- C. Given this research will focus on underrepresented communities, please provide more information on the Proposer's team to meet, address, and represent the needs of African American and Latino households.

### **5.4. Technical Requirements**

- A. Describe the Proposer's experience.
- B. Describe the methods and techniques the Proposer would use to provide the services or products as described.
- C. Given the focus of this initiative on both African American and Latino households, describe the Proposer's ability to address the nuances between and within these two communities, i.e., across gender, age, tenure in the United States, etc.
- D. Describe the Proposer's ability to address and incorporate an analysis provided by an outside partner, for example in the form of a chapter or supplemental analysis.
- E. Describe the Proposer's capacity to engage in a mixed methods approach, for example, in establishing thoughtful points of connection and feedback with a qualitative researcher throughout the research timeline.

## **6. COST**

### **6.1. Proposals Pricing**

The Proposer must complete the Cost Sheet #1 (Attachment 3A) following the instructions provided on the Cost Sheet. The Proposer must complete Cost Sheet #2 (Attachment 3B) and Cost Sheet #3 (Attachment 3C) if they elect to do those additional components. Failure to submit pricing as instructed in the Cost Sheet shall result in rejection of the Qualifications. Include any payments to be made to any qualified DOA-certified MBE or DOA-certified DVB subcontractors performing work under this RFP in the Cost Sheet. Do not alter the format of the Cost Sheet.

### **6.2. Price Adjustments**

The Contractor may lower a price at any time due to general market conditions or other considerations. The Contractor may not request a price increase during the term of the Contract.



**Attachment 1**  
**PROPOSER INFORMATION**

Name of RFP/RFB/RFQ: Quantitative Analysis: African American & Latino Homeownership in Wisconsin

**1. General Company Information**

Proposing Company Name \_\_\_\_\_  
CEO/President Name \_\_\_\_\_  
Street Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_  
Company Website \_\_\_\_\_

**2. Person to Contact for Questions Concerning this Bid**

Name \_\_\_\_\_ Title \_\_\_\_\_  
Street Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_  
Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

**3. Person to Contact for Questions Concerning Orders and Billing**

Name \_\_\_\_\_ Title \_\_\_\_\_  
Street Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip + 4 \_\_\_\_\_  
Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

**4. Components included in Proposal for consideration in addition to the State of African American & Latino Homeownership in Wisconsin report (check all that apply):**

- Additional analysis, ie. Statistical, geospatial, etc.
- Post-production work



**Attachment 2**  
**PROPOSER REFERENCES**

Name of c: Quantitative Analysis: African American  
& Latino Homeownership in Wisconsin

Proposer \_\_\_\_\_

Provide the company name, address, contact person, telephone number, email address and description for three (3) customers to which the Proposer has provided product(s) and/or service(s) with requirements similar to those included in this solicitation document. Failure to provide complete information for three (3) references may result in rejection of the Proposal/Bid/Qualifications.

Company Name \_\_\_\_\_

Address (include Zip + 4) \_\_\_\_\_

Contact Person and Title \_\_\_\_\_

Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Product(s) and/or Service(s) Provided \_\_\_\_\_

\_\_\_\_\_

Company Name \_\_\_\_\_

Address (include Zip + 4) \_\_\_\_\_

Contact Person and Title \_\_\_\_\_

Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Product(s) and/or Service(s) Provided \_\_\_\_\_

\_\_\_\_\_

Company Name \_\_\_\_\_

Address (include Zip + 4) \_\_\_\_\_

Contact Person and Title \_\_\_\_\_

Telephone Number \_\_\_\_\_ Email Address \_\_\_\_\_

Product(s) and/or Service(s) Provided \_\_\_\_\_

\_\_\_\_\_



**Cost Sheet #1**

**Basic Elements: State of African American & Latino Homeownership in Wisconsin Report**

Name of RFP/RFB/RFQ: Quantitative Analysis: African American & Latino Homeownership in Wisconsin

This portion of the RFP is reserved for the Proposer to provide a comprehensive cost proposal. **Prepare a cost sheet in your preferred layout that summarizes all the costs of the proposal broken down into logical categories, including costs for external vendors and subcontractors, if any. If your proposal requires the Authority to acquire, purchase, or contract for additional services, data acquisition, access, or support tools, such costs must be identified and included in the cost sheet.**

**Submit your cost sheet proposal in an Excel and PDF file using the attached cost sheet template.**

**Please detail all costs associated with the following research phases as applicable in the order listed here:**

- Pre-research / preparation
- Research
- Post-production

Please also include an hourly rates for services.

The Authority reserves the right to reject any responses that do not conform to the following stipulations:

- Itemize all costs within the provided template.
- Costs must be fully inclusive and comprehensive. Costs should include but are not limited to: any and all applicable pre-research, research, and post-research services, consulting, subcontracting, documentation, data acquisition, access, and support.
- Failure to provide all applicable costs and associated services may result in the rejection of the subject proposal.

# EXAMPLE REFERENCE: Research Phases and Pilot Design Process

## African American & Latino Homeownership Initiative

### Research and Engagement

- Relevant secondary or case study research
- Diverse community / stakeholder engagement methods
- Collaboration with quantitative researcher

### Ideation

- Create frameworks around learnings from quantitative and qualitative research
- Brainstorming, concept creation, and rapid prototyping
- Develop a business plan for potential solutions

### Implementation

- Assess resources and seek partnerships
- Launch pilot solutions
- Monitor and evaluate
- Share out on learnings