

REQUEST FOR PROPOSALS

SF AMC
THIS IS NOT AN ORDER



Proposal Due Date

Mar 23, 2022, 2:00 p.m. CDT

All questions relating to this Request For Proposal must be submitted in writing to:

Procurement Manager
908 E. Main St, Suite 501
Madison, Wisconsin 53703
procurement@wheda.com

Calendar of Events

Mar 7, 2022

Mar 16, 2022 2:00 p.m. CDT

Mar 23, 2022, 2:00 p.m. CDT

Apr 1, 2022, 2:00 p.m. CDT

May 25, 2022, 2:00 p.m. CDT

RFP Issuance

Deadline for Submitting Written Questions

Proposal Due Date

Schedule Demos

Provide Answers to Security Review Questionnaire

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/>.

MINORITY-OWNED BUSINESS ENTERPRISE (MBE).

DOA-Certified MBE under Chapter 16, WI Statutes.

Over 50% minority ownership and not DOA certified.

DISABLED VETERAN-OWNED BUSINESS (DVB).

DOA-Certified DVB under Chapter 16, WI Statutes. certified.

Over 50% disabled-veteran ownership and not DOA

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
Signature of Authorized Company Representative Named Above	Phone	Fax	Email

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.

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 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 and send an email to procurement@wheda.com which includes 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)
- Prepare one original Cost Sheet (Attachment 3), clearly labeled "Cost Sheet", and attach the separate file of the Cost Sheet (Attachment 3) to the email.

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:

To retain a company that will establish and monitor an acceptable panel of appraisers to provide residential appraisals for WHEDA's Single Family division in compliance with federal and state of Wisconsin rules and regulations as well as in accordance with acceptable mortgage industry standards specified by the secondary market, including FNMA and FHLNC.

The Authority intends to use the results of this process to award one or more Contract(s) to provide the services described in this RFP.

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 is appointed by the Governor, and acts as its Chief Executive Officer. 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, 2020, the Authority had 155 employees, an operating budget of \$24.6 million, and 3.2 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 2020 and 2021 audited financial statements please visit 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"** or **"WHEDA"** 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. **"CFR"** means "Code of Federal Regulations"
- D. **"Contract"** means a contract entered into between the Authority and a successful Proposer resulting from the selection of its Proposal.
- E. **"Contractor"** means a Proposer that is awarded a Contract under this RFP.
- F. **"Cost Sheet"** means a sheet containing pricing information for all costs for furnishing the services as set forth in this RFP.
- G. **"DVB"** means a Disabled Veteran-Owned Business (DVB) certified by the Department of Administration under Chapter 16, Wisconsin Statutes.
- H. **"EAD"** means Electronic Appraisal Delivery Portal.
- I. **"FHFA"** means Federal Housing Finance Agency.
- J. **"FHLMC"** means Federal Home Loan Mortgage Corporation, also known as Freddie Mac.

- K. “**FNMA**” means Federal National Mortgage Association, also known as Fannie Mae.
- L. “**GSE**” means Government-Sponsored Enterprise, such as FNMA and FHLMC.
- M. “**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.
- N. “**HUD**” means U.S. Department of Housing and Urban Development.
- O. “**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.
- P. “**LDP**” means Limited Denials of Participation.
- Q. “**LOS**” means Loan Origination System.
- R. “**LQB**” means LendingQB, now known as MeridianLink Mortgage.
- S. “**MBE**” means a Minority-Owned Business Enterprise (MBE) certified by the Department of Administration under Chapter 16, Wisconsin Statutes.
- T. “**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.
- U. “**Proposal**” means the complete response from a Proposer, including all required documentation described in this RFP.
- V. “**Proposer**” means the individual, company, corporation or other entity that responds to this RFP.
- W. “**Request for Proposals**” or “**RFP**” means this document including appendices, addenda, revisions and/or attachments.
- X. “**SCP**” means Suspended Counterparty Program.
- Y. “**UAD**” means Uniform Appraisal Dataset.
- Z. “**UCDP**” means Uniform Collateral Data Portal.
- AA. “**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 a period of three years commencing as stated in the Contract. The Contract may be renewed for two one-year periods by mutual consent. It is anticipated the services under this Contract shall commence on or about April 25, 2022.

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, with all required Attachments, but 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 via email to:

Procurement Manager
procurement@wheda.com

All Proposals must include the name of the RFP – REQUEST FOR PROPOSALS - SF AMC – in the subject line of the email and include the above-listed Proposals content as attachments.

In addition, all emailed Proposals must also include the following information in the body of the email:

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

For Proposals with attachments exceeding 25 MB in total, contact the Procurement Manager via email noted above.

Proposals must be received in the procurement email inbox indicated above on or before the date and time Proposals are due. Late Proposals will be rejected. Proposals sent to an email address different from that stated above or otherwise not received for any reason will be rejected. Proposers are advised to submit Proposals in advance of the deadline, as any failure of the email to be timely received shall 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 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, electronically 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 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 decisions regarding prices offered in the Proposal or by a person who has been authorized

in writing to act as agent for the Proposer, and has the power to contractually bind the Proposer.

- B. Proposer Information Form** (Attachment 1)
- C. Proposer Reference Form** (Attachment 2)
- D. Cost Sheet** (Attachment 3): Provide the Cost Sheet as both a pdf and an excel file separate from the rest of the Proposal file package. 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 Business 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 Proposal submission. Each such Proposal shall be submitted separately and labeled as Proposal #1, Proposal #2, etc. in the subject line of the email and 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 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 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 related to 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. 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 Proposals shall not be made without the prior written approval of the Authority.

4. PROPOSAL ACCEPTANCE, VERIFICATION AND AWARD

4.1 Proposal Opening

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

WHEDA
908 E. Main St, Suite 501
Madison, Wisconsin 53703

4.2 Proposal 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 Proposal Scoring

Proposals shall be reviewed by an evaluation committee and scored against the stated 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. Mandatory Requirements (Section 5.1)	N/A
B. Organizational Capabilities (§5.2)	20
C. Customer Support (§5.3)	15
D. Business and Technical Requirements (§5.4)	30
E. Corporate Assessment (§5.5)	5
F. Proposals Pricing (§6.1)	<u>30</u>
TOTAL:	100

A Proposal must meet Mandatory Requirements and receive at least 40 points for Evaluation Criteria B, C, D and E 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 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.

4.7 Demonstration

Each finalist selected by the Authority will be required to conduct a virtual demonstration of their solution, at such finalist's sole cost and expense. The Authority reserves the right to revise a Proposal's scoring based on such demonstration.

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 a 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 answer all of the following information requests and questions.

5.1 Mandatory Requirements

The Proposer must meet all of the following mandatory requirements to be considered for award. Describe how you satisfy each mandatory requirement listed below.

A. Compliance requirements:

1. The Proposer must ensure all individuals/entities participating in the appraisal valuation process be trained in and compliant with [GSE General Appraisal Requirements \(such as: Section B4-1.1 of the FNMA Selling Guide\)](#), including Appraiser Independence Requirements (AIR).
2. The Proposer must meet the Appraisal Management Company Minimum Requirements, under [CFR Title 12, Chapter 1, Part 34, Subpart H \(Dodd-Frank Act\)](#).
3. The Proposer must meet the TILA-RESPA Integrated Disclosures (TRID) requirements under [CFR Title 12, Chapter X, Part 1026](#), sections 19(e), 19(f), 19(g), 37, and 38. See also 12 CFR [Equal Credit Opportunity Act \(ECOA\)](#) valuations Rule and Appraisals.
4. The Proposer must comply with [GLBA](#) and [Wisconsin Statute Section 134.98](#). Each finalist will be sent a list of questions as part of WHEDA's Security Review of external partners.
5. The Proposer or their associates must not be on any exclusionary lists, such as the [HUD LDP](#) list, the [FHFA SCP](#) list, or the exclusionary list on [Sam.gov](#).
 - If added to one of these lists, the Proposer must inform WHEDA in writing through email within 24 hours with the appraiser or company on the list, and what list they were added to.
6. The Proposer must have a process in place to ensure staff is fully trained and informed on industry standards including but not limited, FNMA and HUD/FHA guidelines and requirements.

B. Business and Technical requirements:

1. The Proposer must conduct appraisals and provide reports for the following:
 - Full Residential Appraisals
 - Drive-By Appraisals
 - FHA Certified Appraisals
 - Manufactured Home Appraisals
 - Collection / Foreclosure Appraisals
 - Mortgage Purchases
 - Mortgage Refinancing
 - Recertification/Completion Certificate Appraisals
 - Quality Control Desktop or Field Reviews
 - Desktop Review Appraisals
2. The Proposer must provide appraisal reports that:
 - Meet GSE [Documentation Standards \(Such as: Section B4-1.2 of FNMA Selling Guide\)](#).
 - Contain a certification that the Appraiser completed the appraisal within AIR compliance.
 - Are delivered in both .pdf and XML format.
3. The Proposer must inform WHEDA of changes to the appraiser panel.
4. The Proposer must exclude an appraiser from conducting appraisals, as requested by WHEDA.
5. The Proposer must have a process to remove any appraiser that has been listed on any exclusionary list, such as LDP/GSA or FHFA SCP.

6. The Proposer must issue charges and payments between WHEDA and the Proposer through ACH/wire transaction. Checks, cash, credit, or other forms of payment will not be accepted.
7. The Proposer must provide a report at least once a year of appraisers currently on WHEDA's appraiser panel, including their certifications.
8. The Proposer must at least once a year provide a summary of the appraisal assignment rotation of appraisers, such as the percentage of appraisals assigned to an individual.
9. The Proposer's system must have compliance and Security Investigation Logging.

C. Reassignment of Employees:

1. All actions taken by the Proposer regarding employee discipline shall be at the Proposer's sole discretion. The Authority shall be held harmless in any disputes the Contractor may have with the Proposer's employees. Disputes shall include but are not limited to charges of discrimination, harassment, and discharge without just cause.

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 the servicing area your company currently has established. Please include information directly related to ensuring adequate coverage for challenging or remote locations throughout the entire state of Wisconsin.
- C. Describe your capacity for handling appraisal volume on a monthly and annual basis, the turnaround time for each of the appraisals listed in 5.1.B.1 above, and how you maintain those turnaround times.
- D. Describe your staff's knowledge of loan origination, delivery, and underwriting.

5.3 Customer Support

- A. Describe the top three to five reasons why your solution is better for WHEDA than your competitors.
- B. Describe your support model for problem resolution and escalation to include procedures for creating a support ticket, and your support hours.
- C. Describe what staff training is required or recommended to use the proposed solution and services. Applicable costs, if any should be included in the Cost Sheet.
- D. List and describe the professional services you offer for your product. Include partner companies if needed.
- E. Describe your organization's capabilities to support WHEDA's transition to working with your organization, including developing and applying best practice processes.
- F. Describe your business continuity plan.
- G. Describe your disaster recovery plan.
- H. Describe your account support model.

5.4 Business and Technical Requirements.

- A. Describe the loan origination system (LOS) integrations your organization can or has currently implemented.
- B. Describe how your system integrates with MeridianLink Mortgage, formerly known as LendingQB.
- C. Describe any capabilities your system has with UAD, UCDP, and EAD.
- D. Describe your quality control procedures to comply with applicable laws, regulations, and Fannie Mae-specific requirements.

- E. Describe how you record, monitor, and train staff for adherence to AIR, HUD/FHA, and GSE requirements.
- F. Describe how you onboard and monitor an appraiser for adherence with AIR, HUD/FHA, and GSE requirements.
- G. Describe how you pay appraisers in a timely fashion.
- H. Describe your appraisal ordering, quoting, invoicing, status tracking, and review processes.
- I. Describe how you create and manage a panel of appraisers.
- J. Describe how your organization handles changes to appraisal fees.
- K. Describe how you invoice appraisal fees, and itemize them out for billing.
- L. Describe how your organization handles and delivers ad-hoc reports.
- M. Describe your appraisal fee cost model.
- N. Describe how you support Single Sign-On authentication using Active Directory (on-premise deployments only) or Azure AD (cloud deployments only).
- O. Describe how your software works on Windows 10, macOS Monterey, Chrome, Firefox, and Edge.
- P. Describe if you have on premises software, and if it is compatible with:
 - Windows Server 2016 and 2019
 - SQL Server 2019

5.5 Corporate assessment

- A. Please provide a complete set of audited financial statements for the past three years. All financial statements should be prepared to generally accepted accounting principles. Proposer should note that the Authority reserves the right to obtain credit reports and additional financial information about the Proposer as it deems necessary. Proposer shall also provide a copy of its corporate annual report. If Proposer is not a public company, it must provide financial statements that can be used during the evaluation to determine its financial viability.
- B. Provide information on all planned use of third-party subcontractors.
- C. Please provide references in the **Proposer Reference Form** (Attachment 2).

6. Cost

6.1 Proposal Pricing

The Proposer must complete the Cost Sheet (Attachment 3) following the instructions provided on the Cost Sheet. 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 and Concerns

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. As the vacant space become leased adjustments will need to be made as cleaning will need to be performed.



Attachment 1
VENDOR INFORMATION

Single Family AMC

1. General Company Information

Proposing Company Name _____

CEO/President Name _____

Street Address _____

City _____ State _____ Zip + 4 _____

Company Website www. _____

2. Person to Contact for Questions Concerning this Proposal/Bid/Qualifications

Name _____ Title _____

Street Address _____

City _____ State _____ Zip + 4 _____

Telephone Number _____ Email Address _____

Fax Number _____

3. Person to Contact for Questions Concerning Orders and Billing

Name _____ Title _____

Street Address _____

City _____ State _____ Zip + 4 _____

Telephone Number _____ Email Address _____

Fax Number _____



Attachment 2
VENDOR REFERENCES

Single Family AMC

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
Single Family AMC

Costs:	Appraisals	Cost
	Full Appraisal: Conventional Single Family Residence	
	Full Appraisal: Conventional 2-4 Unit	
	Full Appraisal: Conventional Manufactured	
	Full Appraisal: Conventional Condominium	
	Conventional: Final Inspection/ Completion Certificate (1004D)	
	Exterior only or Drive by Conventional	
	Field Review: Conventional	
	Desk Review: Conventional	
	Full Appraisal: FHA Single Family Residence	
	Full Appraisal: FHA 2-4 Unit	
	Full Appraisal: FHA Manufactured	
	Full Appraisal: FHA Condominium	
	FHA: Final Inspection/ Completion Certificate (1004D)	
	Exterior Only or Drive by FHA	
	Field Review: FHA	
	Desk Review: FHA	
	Auxiliary costs per appraisal, if applicable:	
	AMC fee	
	Technology fee	
	Administrative fee	
	Other fee: Please provide a brief description	
	Profession Services:	
	Start Up or Onboarding Fees	
	Support Fees	
	Licensing fees	
	Consulting fees	
	Annual renewal fee, if applicable	
	Maintenance fee, if applicable	
	Any other fees, please list here:	

WISCONSIN HOUSING AND ECONOMIC DEVELOPMENT AUTHORITY

TRAVEL POLICY FOR CONSULTANTS

(Based on current Wisconsin Uniform Travel Schedule Amounts)

The Wisconsin Housing and Economic Development Authority (the "Authority") is required by law, §234.02(3m)(b), Wisconsin Statutes, to adhere to the State of Wisconsin Uniform Travel Schedule. All consultants to the Authority must keep their expenditures, while on travel status, within those guidelines. This document provides basic details concerning travel policies and sets out administrative procedures to implement them.

The Authority will not approve payment for any travel expense which exceeds the maximum Uniform Travel Schedule Amount, except in unusual circumstances when accompanied by a receipt and a full explanation of the reasonableness of such expense. An "unusual circumstance" is defined as being outside the control of the consultant. An expense which exceeds a travel maximum is reasonable only when unavoidable additional expenses would be incurred by trying to adhere to the specified travel maximum.

Lodging

The maximum lodging rate for in-state travel is \$90 per night as of February 1, 2022, excluding sales and/or roomtaxes. The maximum lodging rate is \$95 per night for Milwaukee, Racine, and Waukesha counties.

The choice of lodging will be based on cost, with consideration given to accessibility in conducting business. Written justification is required whenever the maximum room allowance is exceeded.

All lodging expenses must be supported by a copy of the original receipt. Reimbursement will be made only at the single-room rate which must be shown on the receipt.

Meals

The maximum meal reimbursement rates, including tax and tip are (maximum reimbursable tip is 15%):

	In-State	Out-of-State
Breakfast	\$9.00	\$10.00
Lunch	\$11.00	\$15.00
Dinner	\$21.00	\$25.00

Reimbursement for meals will be made when it is necessary to be away from Madison or the consultant's permanent domicile on Authority business as follows:

<u>Departure Time</u>	<u>Return Time</u>	<u>Reimbursable Meals</u>
Before 6:00 a.m.	Before 2:30 p.m.	Breakfast
Before 6:00 a.m.	After 7:00 p.m.	Breakfast, Lunch, Dinner
Before 10:30 a.m.	After 2:30 p.m.	Lunch
After 2:30 p.m.	After 7:00 p.m.	Dinner
After 7:00 p.m.	N/A	None

Original, itemized receipts are required for all meals. Receipts and written justification are required for an unusual cost that exceeds the maximum allowance.

No reimbursement will be made for the cost of alcoholic beverages.

Air Travel

Reimbursement for commercial air travel will generally be limited to the lowest coach fare available at the time reservations for air travel are made.

Taxis and Airport Limousine

Reasonable charges for taxis and airport limousines, including tips of up to 15% are reimbursable when other modes of travel are not available or practical. Receipts are required for any one-way fare that exceeds \$25.

Bus

Bus travel is recommended when traveling within Madison or between Madison and Milwaukee or Chicago. Receipts are required for reimbursement.

Telephone

Reimbursement will be made for business calls.

Personal calls are not reimbursable, except when the consultant's schedule is altered by a geographical location change. One call shall be reimbursed up to \$5.00 per call for each such required change. Such reimbursement shall also be allowed if a travel agenda must be extended by more than one hour.

Automobile Travel

Traffic citations, parking tickets and other traffic violation expenses when traveling on the Authority business are the consultant's responsibility.

Costs for parking and tolls when on travel status will be reimbursed.

1. Personal Vehicle

Reimbursement for the use of a personal automobile for business mileage will be 51 cents per mile.

2. Commercial Rental Vehicles

When commercial transportation is used to arrive at a destination and ground transportation is required at the destination, reimbursement for the cost of a rental car will be provided if:

- a. Written justification is provided indicating that such rental was the most time- and cost-efficient means of transportation available in the situation. The primary State vendor is Enterprise Rent-a-Car.
- b. An economy model was rented or the non-availability of this size automobile is documented.

Insurance

The consultant will be responsible for providing the Authority a Certificate of Insurance necessary to perform the contracted services.

All consultants must provide proof of insurance prior to operating their personal vehicle on Authority business.