



# Michigan Saves<sup>®</sup>

Responses to  
Request for Proposal  
Questions

August 13, 2024

## General

- 1. Based on the RFP and the Michigan Saves website, we understand that currently Michigan Saves is primarily staffed by a consulting firm under a Management Services Agreement. Can you confirm if this RFP is seeking to identify an additional consulting firm, to support the existing staff and bring subject matter specialists, or is the intention of Michigan Saves to have whomever is selected under this RFP staff the agency in the same manner as the current consulting firm? Is this RFP reflects scope that is additive to the current consultant's scope, can you clarify if the current consultant is conflicted from pursuing the RFP?**

*The Michigan Saves Board of Directors is seeking proposals for a new Management Services Agreement to replace the current one. The current Management Services Agreement provides full staffing for Michigan Saves. The Request for Proposal (RFP) invites bidders to submit proposals for either the entire Scope of Work or specific portions of it. Current bidders, including the existing consulting firm, are eligible to submit proposals for the full range of services or for individual components they can effectively manage.*

- 2. Is Michigan Saves seeking support across programs and funding sources or do you have particular programs in mind such as recently issued grants such as Greenhouse Gas Reduction Fund, Solar for All, National Clean Investment Fund funding?**

*Michigan Saves is seeking a vendor to support their existing programs and services, which are funded through multiple revenue sources including fee for service investment income, and grants. Additionally, if future grants or revenue-generating opportunities become available, Michigan Saves will require support to meet the requirements of those new projects.*

- 3. Is the 12 page limit for the entire proposal package, including the response to the minimum bid requirements (including appendices A & B), the cover sheet, company profile/experience/scope of work, and the pricing details, which is a separate document? Or, is the 12 page limit for the body of the proposal, not including the appendices, cover sheet, and the separate pricing document?**

*The 12-page limit does not include the cover sheet, references, the signed appendices and the separate pricing document.*

- 4. Does the 12 page max include the proposal coversheet and references?**

*See above answer.*

## Background

- 5. Will the existing staffing MSA referenced in sect 1.1 remain in place or will it be replaced by the winning bidder MSA?**

*The current Management Services Agreement provides full staffing for Michigan Saves. The Request for Proposal (RFP) invites bidders to submit proposals for either the entire Scope of Work or specific portions of it. Bidders who plan to address*

Section 1.4c: Staffing may propose a staffing structure that best aligns with the services they intend to offer.

## Management Services

### Business Operations

- 6. Is there an expectation/requirement that the bidder will establish a physical operations office(s), including the referenced "communication technologies" and other required infrastructure, as part of the scope?**

*Yes, the expectation would be that the successful bidder(s) established a physical location with the specified communication technologies and other required infrastructure.*

- 7. Does the organization have existing workflow, reporting, and tracking capabilities or will those need to be established?**

*Michigan Saves does have established workflows, reporting and tracking capabilities.*

- 8. In the last bullet "Providing loan application and call center services...", can you provide any estimates for the monthly application and call center volume?**

*Michigan Saves processes about 1,200 loan applications per month and receives about 2,400 calls per month. The estimated number of calls includes those from current/prospective customers, contractors, and lending partners.*

### Strategic Plan Implementation

- 9. For bullet 1 "Implementing the five priorities...", has Michigan Saves already developed a detailed implementation plan for the five priorities?**

*Michigan Saves does have a detailed implementation plan for the five priorities listed in the strategic plan.*

## Program Activities and Deliverables

- 10. To what extent, if any, does Michigan Saves expect the bidder personnel and technology to play a part in the origination, funding and servicing of the residential and commercial loan products referenced in the RFP Introduction and in 1.4b Program Activities and Deliverables?**

*Loan processing is a crucial aspect of Michigan Saves services. Therefore, any bidder aiming to fulfill the requirements specified under Program Activities and Deliverables must be capable of supporting the entire lifecycle of both residential and commercial loan products. This includes handling the initial creation, providing funding, and managing ongoing services.*

## Staffing

**11. What is the expectation/requirement for work location of resources (e.g., office/remote/hybrid)?**

*Michigan Saves does not have specific requirements regarding the work location; therefore, it is up to the successful bidder(s) to determine their preferred location.*

**12. On page 7, the RFP says: "As Michigan Saves is awarded more grants, the need for further staffing may arise. The bidder shall increase the staffing levels to accommodate the workload associated with this grant, with the approval of the Board of Directors." Should respondents include a cost estimate for future hires in the response? Or would the successful respondent need to go back to the board to amend the agreement/increase the budget to accommodate new hires if/when the need arises?**

*The Michigan Saves Board of Directors approves staff salaries as part of the annual budget process. During this process, the Board is informed of any new positions that would increase the budgeted salary. If new positions are required after the budget has been approved, a revised budget proposal must be submitted to the Board for approval.*

## Contract Term

**13. The RFP is for management services during a contract period ending June 30, 2025. What should responders include in the RFP response regarding transitioning management services elsewhere if the contract is not extended beyond the contract period?**

*The bidder should provide a plan for transitioning management services if the contract is not extended beyond July 30, 2025. The plan should include:*

- *A timeline for the transition*
- *The methods for transferring documentation of processes, procedures and key contacts to ensure continuity.*
- *The plan to transfer responsibilities, including staff, equipment, and other resources to the new management entity.*
- *The procedures for securely transferring or archiving data, records, and reports.*
- *The strategy to communicate with stakeholders about the transition process.*
- *Any additional support or training that will be provided to facilitate a smooth transition.*

*This plan can be provided separately from the 12-page limit.*

## Pricing Details

**14. Would it be possible to allow submittal of fully-loaded hourly rates rather than the salaries and fringe benefits?**

*The pricing information should specify separate amounts for personnel costs and fringe benefits. This separation ensures consistency across bidders, allowing for a direct comparison.*

## Structure of Response

- 15. Can you confirm if the intent of the RFP is for the consultant to provide loaned staff resources? Can you confirm whether Michigan Saves will have senior staff in place and be able to provide management decisions (e.g., loan approvals)?**

*The RFP intends for the bidder(s) to provide personnel who will be assigned to Michigan Saves. The staff provided by the bidder(s) will be responsible for making management decisions, such as loan approvals, with guidance from the Michigan Saves Board of Directors.*

- 16. Item 7 says "There is no direct corresponding requirement for this score. Rather, it is an overall assessment of all submitted materials, including supporting documentation. The applicant's proposal demonstrates a strong likelihood that the organization will be optimally managed reflective of the mission and value. (10 points)" Does Michigan Saves expect some sort of response here? What should a respondent do with this item?**

*This is a notification to bidders that 10 points will be awarded based on the overall impression of how well the bidder aligns with and supports Michigan Saves' mission and values. Michigan Saves does not expect a response to this requirement.*