

OFFICIAL NOTICE #57952
Milwaukee Home Down Payment Assistance Program

The Department of City Development (DCD), is requesting proposals (RFP) from qualified Home Buyer Counseling Agencies (the “Agency”) to provide home buyer assistance counseling and administration of the City of Milwaukee’s Home Down Payment Assistance Program

The RFP can be found on DCD’s web site at the following link:

<https://city.milwaukee.gov/DCD/Projects/RFPs>

Questions regarding this RFP should be addressed to Scott Stange in writing via email at: sstang@milwaukee.gov . Deadline for questions regarding the RFP are due by, **January 11, 2022**. Any additional information and/or clarification(s) regarding this RFP will be posted on the above referenced website in the form of an addendum to this RFP by **January 14, 2022**.

Proposals are due January 21, 2022 by 11:00 a.m. CST

***** VIA E-MAIL – to DCDPurchasing@milwaukee.gov *****

(Additional info in the RFP Submission Requirements and Deadline section)

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CITY OF MILWAUKEE
DEPARTMENT OF CITY DEVELOPMENT
809 N. Broadway
Milwaukee, Wisconsin 53202

I. Background

In June of 2021, the City of Milwaukee launched the Milwaukee Home Down Payment Assistance Program (“Program”). The Program was designed to support and promote home ownership in the City of Milwaukee by providing forgivable grants to eligible City of Milwaukee residents to assist them in purchasing a home. A goal of the Program was also to address the disparities in home ownership rates in the City and to assist families of color in achieving home ownership. A description of the Program and current Program guidelines are included as Attachment “A” to this Request for Proposals.

The Program was extremely successful and the original \$1.4 million in funding allocated for the Program has been nearly depleted.

The City recently allocated additional funding for the program through the federal American Rescue Plan Act and wants to continue efforts under the Program to support new home ownership in the City of Milwaukee. It is anticipated the new allocation of funds for the Program will be \$2 million and depending on results, as well as the future availability of resources, additional funding may be allocated to the Program when funds are depleted.

II. Scope of Services

The Department of City Development (“DCD”) is soliciting proposals from experienced and qualified Homebuyer Counseling Agencies (“Agencies”) to administer the Program. A description of the Program and current Program guidelines are attached to this Request for Proposals.

Specifically, the selected Agencies will perform the following duties under the Program:

- Assist in marketing and outreach to promote awareness of the Program in the community
- Accept applications for the Program from interested homebuyers
- Review applications, obtain necessary supporting information and documentation and determine applicant’s eligibility for the Program consistent with the Program guidelines
- Approve applications for the Program consistent with Program eligibility requirements
- Once approved – provide grant funding from funds deposited with agency and execute approved Program documents
- Submit a quarterly report to the DCD detailing the grants originated under the Program and including the information regarding grant recipients and property purchases required for reporting purposes.
- Provide each grant recipient a minimum of 8 hours of home buying counseling services to help prepare them for home ownership.

III. Project Requirements

A. Contract

If selected, a contract will be entered into between City of Milwaukee and the Agency and will be for one year, with the option to extend the contract for two additional one-year terms, depending on results and the availability of funding, upon mutual consent of both parties. DCD reserves the right to award up to five separate contracts. DCD reserves the right to terminate the Contract at any time if performance fails to meet the terms and conditions outlined in this Request for Proposals and in the Contract. DCD

B. Coordination

A staff member from DCD will coordinate the project. The Agency also will be required to submit quarterly activity reports to DCD in a format prescribed by DCD and must agree to respond within reasonable timeframes to requests for information.

C. Compensation

Selected Agency(ies) will be entitled to a grant "processing" fee for each grant closed under the Program. The amount of the fee shall be 10% of the amount of the grant that is closed (e.g., if a grant of \$5,000 is originated under the Program, a fee of \$500 will be paid under the Program).

Within 15-30 days of execution of a contract with selected agency (ies), the City shall provide Agency with an initial deposit to be used to originate grants and pay processing fees pursuant to the Program guidelines. Every three months thereafter, the City will review the balance held by Agency(ies) to be used for implementing the Program and will determine, in City's sole discretion, if a deposit of funds is needed to meet demand for the Program. Any interest earned on funds on deposit with the Agency shall be used for additional Program activities.

D. Products

The Agency shall provide deliverables as noted in the Scope of Services. All documentation (including work in progress) from this contract will remain the property of the DCD. DCD will have access to all other working papers or information stored on a computer or hard drive of the Agency concerning this contract; the Agency should check with the DCD (City) prior to destroying any working papers.

E. Americans with Disabilities Act

The City complies with the Americans with Disabilities Act of 1990. Upon reasonable notice, we will accommodate the needs of disabled individuals through sign language interpreters or other auxiliary aids. Further, the successful Contractor must agree to comply with all applicable requirements of this Act in the performance of this Contract.

F. Insurance

See Attachment C see for minimum insurance requirements that awardees must provide prior to executing the contract.

IV. Proposal Submission Requirements and Selection Procedures

A. Proposal Contents

In order to simplify the review process and to obtain the maximum degree of comparability, proposals should be organized in the following manner. Failure to comply with these requirements may be cause for the proposal to be considered non-responsive.

1. Letter of Transmittal

This letter should state concisely, in less than one page, the proposer's understanding of the work to be performed, and the ability of the firm to perform the work.

2. Title Page

The title page should include “Request for Proposals, Department of City Development City Milwaukee Home Down Payment Assistance Program” the name of the proposing agency, address, telephone number, name of contact person, email address and the date.

3. Qualifications and Experience

Proposers should describe:

- Specific experience in administering down payment assistance programs, including the specific grant programs administered and the volume of grants processed and approved. Include details on program administration experience, including evaluating and verifying household income, buyer contributions for down payments, and working with lenders to verify and evaluate financing commitments. Further information should also include the dates the work was performed, whether key persons assigned to these programs are still with the Agency and available to work on this project
- Homebuying counseling experience, including past experience as a HUD certified homebuying counseling agency and experience in counseling first time homebuyers.
- Experience in working with homebuyers of color and specific successes/results in this area.

4. Staffing

The Agency must identify of the specific people/person who would manage this project and a description of their experience and qualifications.

5. Additional Documentation

If applicable, review and submit Designation of Confidential and Proprietary Information (Attachment “D”) and Socially-Responsible Contractors (SRC) Affidavit of Compliance (Attachment “E”)

V. SELECTION OF AGENCY

DCD will use specific criteria for evaluating proposals to perform these services. The evaluation will assign points to each response in a number of categories, which are discussed below DCD retains the right to request additional information from the most qualified Proposer(s).

- Qualifications and Experience in administering down payment assistance programs (a maximum of 25 points)
- Qualifications counseling first time homebuyers and past experience as HUD certified Homebuying counseling agency (a maximum of 25 points)
- Experience and track record in successfully working with underserved populations, including communities of color (a maximum of 25 points)
- Current capacity to meet all the needs of the Program (a maximum of 25 points)

If an SRC is a responsive and responsible Proposer, an additional number of points equal to 5% of the maximum number of points used in the evaluation of the RFQ shall be applied to the total score attained by the SRC (see Attachment E).

VI. SUBMISSION REQUIREMENTS AND DEADLINE

All questions and communication regarding this RFP process and scope of services should be submitted in writing to Scott Stange at sstang@milwaukee.gov . Questions must be sent in writing no later than **January 11, 2022**. Questions initiated after **January 14, 2022** will not be considered. Any additional information, clarification and answers to the questions submitted by the deadline date will be posted on the Internet on the website referred to below in the form of an addendum to this RFP by **January 14, 2022**: <http://city.milwaukee.gov/DCD/RFPs>

Proponents will be responsible for keeping abreast of the addenda as they are posted. All such addenda shall become a part of the RFP, and all Proponents shall be bound by such, whether or not received by the Proponent

- **Effective immediately, all DCD RFP's should be submitted electronically to:**

DCDPurchasing@milwaukee.gov

- **Proposals are due January 21, 2022, 11:00 am CST.**
- The proposals must be submitted electronically.
Late submissions will not be accepted.
- Proposal Submissions are to clearly indicate in the subject line of the email submission:
**Official Notice #57952 Milwaukee Home Down Payment
Assistance Program**

DCD cannot and does not guarantee that emailed proposals are received. Emailed proposals must be received in their entirety before the bid closing time.

**Please note, the size of one email cannot exceed 50MB

VII. General RFP Requirements

1. Interpretations of RFP

Any requests for interpretation should be submitted in writing to Scott Stange, Procurement and Compliance Manager, Department of City Development, by email to sstang@milwaukee.gov. No oral interpretations will be made to any Contractor as to the meaning of the RFP requirements. All interpretations will be posted and answered on the Internet. If you received your RFP from the Internet you will be responsible for keeping abreast of the addenda as they come in. All such addenda shall become a part of the RFP, and all Contractors shall be bound by such, whether or not received by the Contractor.

2. Receipt of Proposals

Proposals received prior to the time of opening will be secure. The officer whose duty it is to open them will decide when the specified time has arrived, and no proposal received thereafter will be considered. No responsibility will be attached to an officer for the premature opening of a proposal not properly addressed and identified.

Contractors are cautioned to allow ample time for transmittal of proposals by email.

3. Withdrawal of Proposals

Proposals may be withdrawn on written request dispatched by the Agency in time for delivery in the normal course of business prior to the time fixed for closing. Negligence on the part of the Agency in preparing a proposal for offer to DCD confers no right of withdrawal or modification of the proposal after such proposal has been opened. In case of withdrawal of a proposal by a Agency, the Agency will be disqualified thereby from submitting a second proposal on the contract at hand. See Section 66.0901(5), Wisconsin Statutes.

4. Rejection of Proposals

DCD reserves the right to reject the proposal of any Agency who has previously failed to perform properly or to complete on time contracts of a similar nature, who is not in a position to perform the contract, or who has habitually and without just cause neglected the payment of bills or otherwise disregarded his obligations to subcontractors or employees.

5. Award of Contract

DCD Staff will evaluate proposals. All proposals will be evaluated against the evaluation factors stated in this RFP. While the Contract Management Team intends to select a Agency based on the proposals received, the Contract Management Team may invite the highest ranked firm/individual(s) to participate in an interview. If one or more interviews are to be scheduled, a letter will be sent to the firm/individual(s) that is/are selected to participate, and this/these firm/individual(s) may be asked to provide more specific written information about their qualifications, methodology, and costs. Firms/individuals participating in the interviews must send the project manager and staff who will work on this project.

After the contract is awarded, all of the firms who submitted a proposal will receive a written acknowledgment of their proposals. DCD will not reimburse firms for any expenses associated with the submission of proposals or participation in the interviews.

6. Contract Payments

DCD and the Agency will agree on a performance and payment schedule. The Agency will submit to DCD invoices itemizing the services performed and cost incurred since the last request for payment. Payment will be made after review of the Agency's work product and upon acceptance by DCD of the services performed.

7. Termination of Contract for Cause (Non-Negotiable)

If, through any cause, the Agency shall fail to fulfill in a timely and proper manner his obligations under this contract or if the Agency shall violate any of the covenants, agreements or stipulations of this contract, DCD shall thereupon have the right to terminate this contract by giving written notice to the Agency of such termination and specifying the effective date thereof, at least five work days before the effective date of such termination. In such event, all finished or unfinished documents, data, studies, surveys, reports, or other material related to the services prepared by the Agency under this contract shall, at the option of the DCD, become the property of DCD. Notwithstanding the above, the Agency shall not be relieved of liability to DCD for damages sustained by DCD by virtue of any breach of the contract by the Agency.

8. Sales Tax (Non-Negotiable)

Pursuant to Section 77.54(9a) of the Wisconsin State Statutes, the City of Milwaukee is exempt from Wisconsin Use and Sales Tax. Agencies, therefore, shall not add State of Wisconsin sales tax or use tax to their proposals, but shall include in their lump sum proposals only the taxes they will be required to pay directly as a consumer, when obtaining materials, etc. to fulfill the contract requirements should they be the selected Agency. Agencies are, however, responsible for determining the impact of the State of Wisconsin's Sale and Use Tax on their proposal.

9. Request for Proposal

This RFP is not an offer to buy and must not be assumed as such. However, in the event a proposal results in contractual negotiations, the Agency has the option to not convey and/or sell if compliance with any mandated clause or provision is undesirable or impossible.

No information will be available to any Agency regarding the status of his response. However, DCD reserves the right to enter into discussion with Agencies for purposes of clarification or further information.

10. Miscellaneous

DCD reserves the right to waive informalities in any proposals, reject any or all proposals in whole or in part, with or without cause, and to accept that proposal which in its judgment best meets its needs. DCD will require an Affidavit of No Interest, which provides that no official or employee of DCD, the Contract Management Team, and/or the City of Milwaukee has or will receive anything of value in connection with the issuance of this contract.

11. Equal Employment Opportunity

The Agency agrees that there will not be discrimination as to race, sex, sexual orientation, religion, color, age, creed, or national origin in regard to obligation, work, and services performed under the terms of any contract ensuing from this RFP. Agency must agree to comply with Executive Order No. 11246, entitled "Equal Employment Opportunity" and as amended by Executive Order No. 11375, as supplemented by the Department of Labor Regulations (41 CFR, Part 60).

12. Indemnification (Non-Negotiable)

The Agency agrees that it will indemnify, save and hold harmless DCD and the City of Milwaukee, their officers, employees, or agents, from and against all claims, demands, actions, damages, loss, costs, liabilities, expenses, judgments, and litigation costs, including reasonable attorneys fees, photocopying expenses and expert witness fees, recovered from or asserted against DCD or the City of Milwaukee on account of injury or damage to person or property or breach of contract to the extent that such damage, injury, or breach may be incident to, arising out of, or be caused, either directly or proximately, wholly or in part, by an act or omission, negligence or misconduct on the part of the Agency or any of its agents, servants, employees or subcontractors.

DCD shall tender the defense of any claim or action at law or in equity, arising out of or otherwise related to an act or omission, negligence, misconduct, or breach of contract on the part of the Agency or any of its agents, servants, employees or subcontractors, to the Agency or its insurer and, upon such tender, it shall be the duty of the Agency and its insurer to defend such claim or action without cost or expense to DCD.

13. Slavery Disclosure (Non-Negotiable)

The successful Agency will be required to submit an affidavit of compliance of slavery disclosure before a purchase order/contract can be executed (unless you have already done so and it is on file with the Business Operations Division of the City of Milwaukee).

14. Ethics (Non-Negotiable)

It is the policy of the Department of City Development, that contracts shall not be awarded to any Agency team that includes individuals who have left City employment within the past 12 months, or individuals who are currently members of any City boards or commissions.

15. Wisconsin Public Records Law (Non-Negotiable)

Both parties understand that the City of Milwaukee is bound by the Wisconsin Public Records Law, and as such, all of the terms of this Agreement are subject to and conditioned on the provisions of Wis. Stat. 19.21, *et seq.* The Agency acknowledges that it is obligated to assist DCD in retaining and producing records that are subject to Wisconsin Public Records Law, and that the failure to do so shall constitute a material breach of this Agreement, and that the Agency must defend and hold DCD harmless from liability under that law. Except as otherwise authorized, those records shall be maintained for a period of seven years after receipt of final payment under this Agreement.



MILWAUKEE HOME DOWN PAYMENT ASSISTANCE PROGRAM

The City of Milwaukee wants to help you realize your dream of homeownership! The Milwaukee Home Down Payment Assistance Program offers forgivable grants of up to \$7,000 to help you purchase your City of Milwaukee home.

GRANT AMOUNTS

Grants of \$5,000 are available for a home purchase in the City of Milwaukee. Grants of \$7,000 are available if purchasing a home with the City's Community Development Block Grant Area boundary (to check if your property is in the boundary, go to www.mymilwaukeehome, type in address and click "submit address" and click on "special interest" link.)

ELIGIBILITY

Residency:

Buyer must be a current City of Milwaukee resident.

Income:

Must have a total household income no greater than:

Family Size	Maximum Household Income	Family Size	Maximum Household Income
1	\$47,250	5	\$72,900
2	\$54,000	6	\$78,300
3	\$60,750	7	\$83,700
4	\$67,500	8	\$89,100

Owner Occupancy

Home must be purchased for owner occupancy and buyer must live in the home for a minimum of five years.

Homebuyer Counseling

Buyer must complete 8 hours of counseling from a HUD approved Homebuying Counseling Agency.

First Time Homebuyer

Buyer may not have owned a home in the last three years.

OTHER REQUIREMENTS:

- Buyers must have a minimum of \$1,000 of their own funds to contribute to the transaction
- Funds can be used for down payment and closing costs.
- Buyer must obtain a third party Home Inspection as part of the purchase
- Loan origination/funding fees must not be more than 2% of the loan amount (*note: for loans in an amount of \$50,000 or less, origination funding fees of up to \$1,000 may be charged.*)
- The interest rate on the buyer's first mortgage must be no more than 2% above the average mortgage for a 30 year fixed rate mortgage contained in Freddie Mac's Primary Mortgage Survey ([www. FreddieMac.com/pmms](http://www.FreddieMac.com/pmms))
- No cash out can be received as part of the transaction

ATTACHMENT B

Terms and Conditions

Provisions of the Department of Administration – Purchasing Division’s Terms and Conditions dated February 4, 2020, and subsequent addenda, except as may be modified or expanded upon in this Invitation to Bid, shall apply to all contractors and subcontractors working on the project. For this RFP and resulting contract, Section II Terms Applicable to Contracts Paid for With Federal Funding, shall apply

For a copy, please go to the following link and click on “City of Milwaukee Terms & Conditions - updated 2/4/2020” . Any special conditions in this Request for Proposals shall take precedence over any conflicting provisions stated elsewhere in these terms and conditions.

<https://city.milwaukee.gov/Purchasing/PP/TC>

Attachment C - INSURANCE REQUIREMENTS

A. General Requirements

A certificate of insurance acceptable to City evidencing the insurance requirements is to be provided. The certificate shall state that the issued insurance policies meet the requirements as outlined below. All certificates are to be provided within 30 days of final execution of this Contract. If such certificate is not received, the City of Milwaukee has the authority to declare this Contract terminated.

All policies shall state that the City shall be afforded a thirty (30) day written notice of cancellation, non-renewal or material change by any insurers providing the coverage required by City for the duration of this Contract.

Insurance companies must be acceptable to City and must have a current A.M. Best rating of A-VIII or better.

All policies shall be written on an occurrence form, other than Real Estate Errors and Omissions as noted below.

If subcontractors are used, each must meet all requirements in sections A and B.

B. The minimum insurance requirements are as follows:

(1) Workers' Compensation and Employer's Liability

Workers' Compensation Statutory Coverage
Bodily Injury by Accident \$100,000 each accident
Bodily Injury by Disease \$500,000 policy limit
Bodily Injury by Disease \$100,000 each employee

- Employer's Liability at limits noted above or higher limits if needed to meet Umbrella underlying insurance requirements.
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers

(2) Commercial General Liability

Commercial General Liability \$1,000,000 each occurrence
General Aggregate \$2,000,000 aggregate
Personal & Advertising Injury Limit \$1,000,000 each occurrence
Products - Completed Operations Aggregate \$2,000,000 aggregate
Medical Expense \$ 5,000 each person

- Coverage must be equivalent to ISO form CG0001 or better.
- The City of Milwaukee shall be added as an additional insured using ISO form CG2026 or its equivalent.
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers.
- The policy shall include independent contractors (owners/contractors protective) and contractual liability.
- Coverage will apply on a primary and non-contributory basis. We suggest the following wording:
"If you have agreed in a written contract that this policy will be primary and without right of contribution from any insurance in force for an Additional Insured for liability arising out of your operations, and the contract was executed prior to the bodily injury, property damage, personal injury or advertising injury, then this insurance will be primary over, and we will not seek contribution from, such insurance.
- Coverage shall apply to the risks associated with or arising out of the services provided under this contract.

Attachment C - INSURANCE REQUIREMENTS

(3) Auto Liability

Combined Single Limit \$1,000,000 each accident
Medical Expense \$ 10,000 each person

- If the Contractor owns or has any long term leased vehicles, coverage must be for Any Auto (Symbol 1). If there are no owned or long term leased vehicles, then coverage must be for Hired and Non-Owned Auto Liability (Symbols 8 and 9).
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers.
- The City of Milwaukee shall be added as an additional insured.
- Coverage shall include contractual liability for risks assumed in this contract.
- Coverage shall apply to the risks associated with or arising out of the services provided under this contract.
- If Federal or State government(s) require a Motor Carrier filing, such filing shall be made available to City upon request.

(4) Professional Liability

Combined Single Limit \$1,000,000 each accident

- Coverage must remain in effect for a period of not less than two years beyond the termination date of the contract.
- If a claims-made form is used and a change of insurer occurs during the contract period, continuity of coverage must be maintained by either retaining the original retroactive date or exercising the extended reporting period endorsement option from the expired policy for a period of not less than two years, if the replacement insurer will not preserve the original retroactive date.
- Coverage shall be modified to include a Waiver of Subrogation Endorsement in favor of City including its directors, officers, agents, employees and volunteers.

Attachment D

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

Material submitted in response to the DCD Request for Proposal No. 57952 includes proprietary and confidential information that qualifies as a trade secret, as provided in Wis. Stats. §§ 19.36(5) & 134.90, or is otherwise material that can be kept confidential under the Wisconsin Public Records Law. As such, the proponent asks that certain pages, as indicated below, of this proposal be treated as confidential material and not released, to the extent allowed by Wisconsin law. Therefore, I am providing the following information with the express understanding that it is being submitted to DCD under a pledge of confidentiality. I would not have submitted this information had the DCD not pledged to keep it confidential* and request that the following pages not be released:

<u>Section</u>	<u>Page</u>	<u>Topic</u>

*NOTE: Proponents are cautioned that the ENTIRE PROPOSAL WILL NOT FALL WITHIN THE CONFINES OF THE PLEDGE OF CONFIDENTIALITY. PLEASE LIMIT DESIGNATIONS OF CONFIDENTIALITY ONLY TO PROPRIETARY OR TRADE SECRET INFORMATION, OR OTHER LIMITED INFORMATION THAT YOU PROVIDE ONLY UPON RECEIPT OF A PLEDGE OF CONFIDENTIALITY

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY.

Failure to include this designation in the proposal response may mean that all information provided, as part of the proposal response will be open to examination and copying.

Signature (Authorized Representative)	Telephone Number
Name (Please Print)	Company Name
Title	Date

NOTE: The DCD, as custodian of these public records has the obligation, pursuant to the Public Records Law, to determine whether the above information can be kept confidential.

The DCD will notify any proponent if a determination is made that the requested information cannot be kept confidential.

PROPRIETARY INFORMATION: Proprietary information submitted in response to this request for proposal will be handled in accordance with applicable DCD procurement regulations. A proponent responding to this proposal should not include any proprietary information as part of its proposal unless the proponent 1) designates the specific information that it maintains is proprietary and the reason(s) for such designation in a separate document to the DCD, Purchasing/Contract Services Division and 2) identifies the specific information when it occurs within the proposal.

The DCD preference is for the proponent to segregate all information designated as confidential into one section of the Request for Proposal and/or a separate document for easier removal to maintain its confidential status. The response to the proposal should indicate which portion of the requested information is confidential and where this information is located within the response, i.e. under separate cover, in confidential Section No. _____, etc. Data contained in the proposal and all documentation becomes the property of the DCD, Purchasing Division.

Generally, proposals are available for public review after the Purchasing/Contract Services Division has awarded and executed a contract.

ATTACHMENT E

DEPARTMENT OF ADMINISTRATION-PURCHASING DIVISION



SOCIALLY-RESPONSIBLE CONTRACTORS (SRC)
AFFIDAVIT OF COMPLIANCE

NOTE: This affidavit must be completed in its entirety and submitted with your bid or proposal to be considered for SRC bid incentive.

Bid or RFP #: _____

Company Name: _____

Address, City, State, Zip: _____

A "Socially-Responsible Contractor" or "SRC" is an entity submitting a bid as part of the City's formal competitive bidding process that has acted or implemented a program to eliminate, or significantly reduce, barriers to employment for current and prospective employees of the contractor. Actions or implemented programs shall include at least three (3) of the programs listed in Section I below. To indicate which programs you have acted or implemented, place a checkmark in the box next to each item pertaining to the business entity as a bidder or proposer for the City of Milwaukee.

I. SRC CRITERIA

- A. Hire persons with felony convictions;
B. Assist current or prospective employees with earning their high school diploma;
C. Underwrite or facilitate industry-linked career-assessed pre-employment services and subsidized work experience including: internships, job shadowing, on-the-job training, and summer employment;
D. Partner with an employment service agency to monitor and track individualized employment plans;
E. Provide, underwrite, or facilitate industry-linked career-based instruction to current or prospective employees in areas such as the following: blueprint reading, basic math and measurement, technical math, labor history, construction culture and essential skills, health and safety awareness, manufacturing processes and production, maintenance, and budgeting and financial literacy;
F. Provide or facilitate occupational skills training and related adult mentoring and networking;
G. Underwrite or facilitate subsidized or unsubsidized programs which provide supportive services for current or prospective employees to obtain or fund the following:
- A valid driver's license
- Transportation vouchers to work and home
- Appropriate work attire, work safety gear, and other needed equipment
- Testing and certification fees
- Legal aid services
- Child care and family-related dependent care
- Emergency housing, health care, and short-term emergency assistance
- Career and training services
- School supplies, books, and fees
- Referrals for medical services and exams
- Reasonable accommodations for persons with disabilities
H. Partner with employment agencies to supplement subsidized wages to ensure employees receive a living wage;
I. Provide breast feeding facilities for employees who are nursing children;
J. Provide a minimum of 120 hours of paid sick leave;
K. Provide a minimum of five (5) paid sick days;
L. Provide an employer-assisted housing program providing homebuyer assistance in the form of mortgages, down payment assistance, or homebuyer education for residences within walking distance of their employer;
M. Provide assistance to reduce fees and penalties on tardy child support payments, manage payment of child support arrears, and become current on child support obligations.

II. DISCLOSURE

The purpose of the *Socially-Responsible Contractor* Program (SRC) is to ensure contributions toward community betterment made by socially-responsible contractors are recognized and rewarded. Each bidder or proposer seeking to qualify for the SRC bid incentive shall submit, as part of its bid or proposal, this sworn affidavit describing actions taken and programs implemented to eliminate, or significantly reduce, the barriers to employment for current and prospective employees of the contractor. The outcomes of these actions and programs shall be described in verifiable detail in the section below. (Please include an attachment if additional line space is required).

This signed and notarized affidavit of compliance will be the contractor's sworn statement that the business satisfies the criteria for Socially-Responsible Contractors pursuant to Chapter 310-10 of the City of Milwaukee Code of Ordinances.

I hereby declare compliance with Chapter 310-10 of the City of Milwaukee Code of Ordinances.

Authorized Signature: _____

Printed Name: _____

Date: _____

III. NOTARIZATION

Subscribed to before me on this _____ day of _____ in the year _____, at
_____ County, _____ State.

NOTARY PUBLIC SIGNATURE: _____

(SEAL)

PRINT NAME: _____ My commission expires: _____

PLEASE SUBMIT THIS FORM WITH YOUR BID OR PROPOSAL