Montana Community Reinvestment Program Guidance for Professional Services Procurement

To be eligible for reimbursement of professional services, including architectural, engineering, and land surveying services, these services must be procured in compliance with applicable state and federal laws, including but not limited to, any applicable sections of MCA §§ 18-8-201 through 212. Montana Community Reinvestment (MCR) Grantees must submit an attestation (provided as Exhibit 3 in the MCR Application and in the MCR Contract) certifying the appropriate procurement process was followed prior to requesting reimbursement.

For procurement of planners, grant writers, and consultants, CMT recommends Grantees follow the best practice of using the formal Request for Proposals (RFP) process to increase the community's ability to hire the best qualified consultant. An RFP should be concise, contain all the important information needed for firms to respond in a factual manner, and indicate the services the consultant would be expected to provide. It also should include information regarding the time frame, factors that will be used to evaluate the responses, and a contact person.

At a minimum, local governments are required to conduct limited solicitation. Grantees will be asked to provide documentation that a minimum number of adequate, qualified firms were contacted in writing or via phone and provided formal quotes for consideration. Commerce recommends reaching out to 3-5 firms. The grantee will be required to submit evidence the limited solicitation process was followed and documentation of the review and selection process. Any representative hired by a local government to conduct the RFP solicitation or procurement process cannot be subsequently hired by the local government to perform the planning services.

The next two pages include language for a sample RFP, both in a long and short form. These sample documents are meant to be used as guidance documents and are not intended to be the final version that a Grantee uses for an RFP. Commerce recommends all Grantees procuring professional services verify with their local government procurement officer to ensure compliance with all procurement requirements.

Short Form – for Publishing in Applicable Regional Newspaper

REQUEST FOR PROPOSALS

DOCUMENT TYPE

GRANTEE - COUNTY, Montana

Issued DATE

GRANTEE is requesting proposals from qualified professional consultants to complete a PROFESSIONAL DOCUMENT TYPE report which will be used as the foundation to update the GRANTEE'S DOCUMENT TYPE with respect to increasing the affordable housing supply - with a special emphasis on the following criteria: attainable workforce housing; a plan to obtain funding for affordable housing solutions through both public and private resources; and a plan to work with private and non-profit housing developers to provide the type of housing that GRANTEE needs for healthy growth and sustainability.

In addition to providing much needed data for attainable, affordable housing, one goal of the comprehensive housing study and analysis will provide the required data for SB 382 compliance (the newly enacted Montana Land Use and Planning Act), bringing the GRANTEE closer to meeting SB 382 requirements.

This request for proposals is subject to the award of supporting funds. GRANTEE has applied to the Montana Department of Commerce under the State-funded Montana Community Reinvestment Plan Act, HB 819, to develop a DOCUMENT TYPE. Subject to the award of funds, this grant will be matched by local contributions.

Copies of the detailed Request for Proposals (RFP), including a description of the services to be provided by respondents, the minimum content of responses, and the factors to be used to evaluate the responses, can be obtained by contacting: (insert contact information).

Responses to this RFP will be received by the GRANTEE at ADDRESS until TIME on DATE. The GRANTEE reserves the right to reject any or all proposals and to waive any formality and technicality.

Long Form – To be Distributed to Interested Consulting Firms

REQUEST FOR PROPOSALS

Comprehensive Affordable Housing Study and Analysis

GRANTEE - COUNTY, Montana
Issued DATE

GENERAL INFORMATION

The GRANTEE is requesting proposals from qualified professional consultants to complete a TYPE OF REPORT report which will be used as the foundation to update the GRANTEE / GRANTEE'S DOCUMENT TYPE with respect to increasing the affordable housing supply with a special emphasis on the following criteria: attainable workforce housing; a plan to obtain funding for affordable housing solutions through both public and private resources; and a plan to work with private and non-profit housing developers to provide the type of housing that GRANTEE needs for healthy growth and sustainability.

In addition to providing much needed data for attainable, affordable housing, one goal of the GRANTEE DOCUMENT TYPE will provide the required data for SB 382 compliance (the newly enacted Montana Land Use and Planning Act), bringing GRANTEE closer to meeting SB 382 requirements.

This request for proposals is subject to the award of supporting funds. GRANTEE has APPLIED/BEEN AWARDED to the Montana Department of Commerce under the State-funded Montana Community Reinvestment Plan Act, HB 819, to develop a GRANTEE DOCUMENT TYPE. This grant will be matched by local contributions.

BACKGROUND

(Add any project background information as desired.)

SCOPE OF SERVICES

The successful firm shall provide the following services in a professional and timely manner:

(Insert work scope here – any more details as desired.)

COMPENSATION AND PAYMENT

The successful consultant will be paid for services provided pursuant to an approved work plan and contract budget approved by GRANTEE.

COST AND AWARD PROCEDURE

GRANTEE will utilize a "proposals based" selection process to negotiate a contract with the firm determined to be the most qualified at a price, which is determined to be fair and reasonable. Costs will not be discussed until the top ranked respondent has been selected for contract negotiations.

GRANTEE reserves the right to accept or reject any and all proposals, or parts of proposals; waive technicalities; and to make its decision on the basis of merit, appropriateness, and any other factor. Unless all

proposals are rejected or the solicitation is canceled, a contract will be awarded to the Respondent whose proposal best meets the requirements and criteria set forth in this solicitation, subject to the receipt of funds from the State of Montana.

TIMELINE FOR PERFORMING WORK

The overall timeline for the comprehensive housing study and analysis is 6 months (180 calendar days) beginning on _____, 2024.

EVALUATION AND SELECTION PROCEDURE

The following procedures shall be followed to evaluate prospective firms for selection to provide services for GRANTEE:

Evaluation and Selection Committee:

A five (5) member Evaluation and Selection Committee that will be comprised of – insert position titles as desired -- will evaluate all qualifying proposals received by the submission deadline and present an award recommendation to GRANTEE. GRANTEE shall make the final award decision.

Evaluation Criteria:

Evaluation will be based on the Evaluation and Selection Committee's understanding of the prospective consultant's capability for providing the Scope of Services requested. **In making this judgment, the Evaluation and Selection Committee will review all consultant submissions subject to the individual firm's responses to the following criteria - which must be addressed in the consultant's proposal:**

1. Qualifications of the professional personnel to be assigned to the project.
2. The Consultant's capability to meet time and project budget requirements.
3. Location of the firm
4. Present and projected workloads.
5. Related experience on similar projects [specifically, the firm's experience preparing housing reports, studies, and community-wide housing plans, especially experience related to the collection and analysis of housing data and development of action plans to address identified, affordable housing needs, with special emphasis on the needs for workforce housing].
6. Recent and current work for the GRANTEE and/or other communities in Montana or nearby states.
7. Quality of the proposal package.

References -

Identify a minimum of three (3) work references completed within the last five years similar in scope and nature to this housing study project. Provide the name of the organization, contact person, telephone, and email contact if available.

The listed criteria will be evaluated and individually scored based on a rating scale of 1-5; 1 - Insufficient, 2 - Below average, 3 - Average, 4 - Above average, and 5 - Exceptional. Each listed criteria will be awarded points based on how each Selection Committee member grades the Consultant's proposal package. Upon completion of the Selection Committee's initial evaluation, the Committee will tally the rating score of all reviewed proposals to determine an initial collective score awarded to each Consultant. Scores will then be reviewed, and final scores assigned by consensus of the Selection Committee.

The highest scoring consultants may be invited to an in-person or virtual interview with the Evaluation and

Selection Committee with final scoring adjusted as necessary, according to the consensus of the Committee.

Award of Services:

Following the review of submitted proposals and candidate firms, the Evaluation and Selection Committee will make a recommendation to GRANTEE for award to the highest scoring consulting firm.

SUBMITTAL REQUIREMENTS

Complete proposals are to be mailed or delivered to insert contact and title, GRANTEE address and appropriate email address, prior to **5:00 PM M.D.T. on _____, 2024.** Submittal of proposals via email, hard copy via mail, or personal delivery of hard copy to GRANTEE in CITY/TOWN/COUNTY are acceptable.

SUBMITTALS RECEIVED AFTER THE DEADLINE WILL NOT BE CONSIDERED.

Project Contact / Inquiries:

Inquiries concerning this proposal should be directed to: CONTACT PERSON, TITLE, INSERT ADDRESS, TELEPHONE NUMBER, AND EMAIL ADDRESS.