

# HOME/HTF Affordable Housing Development Grant Administration Manual Tools and Resources

## Sample Request for Proposals (RFP) for Project Management Services

This resource serves as an example of a Request for Proposals (RFP) for project management services and can be modified for specific projects and circumstances.

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The (Town or City or County of) has been given a federal HOME Investment Partnership Program / Housing Trust Fund (HOME/HTF) award in the amount of \$                      by the Montana Department of Commerce (DOC) for (description of project including purpose, location, time frame, and present status).

Contingent upon this award, the (Town or City Council or County Commission) is soliciting proposals for management services to assist the (Town, City or County) in the administration of this project in compliance with all applicable requirements under the Montana HOME/HTF Program as described in the current edition of the Montana HOME/HTF Rental Housing Grant Administration Manual. Payment terms will be negotiated with the selected offeror. The fee for project management services will be paid with HOME/HTF funds.

The services to be provided will include:

1. Preparing all written reports, checklists, or legal notices required to assure compliance with federal and state environmental requirements;
2. Drafting a management plan and contract for review and approval by Commerce;
3. Establishing and maintaining project files and preparing all documentation and reports required for administration of the grant;
4. Assisting the (Town, City or County) with the selection of a project architect, in conformance with applicable procurement requirements, including the preparation of a request for qualifications;
5. Reviewing all proposed project expenditures to ensure their propriety and proper allocation to the project budget;
6. Participating in the pre-construction conference and periodic construction progress meetings;
7. Serving as the (Town's, City's or County's) designated Labor Standards Officer and assuring compliance with all applicable labor standards requirements (if applicable);
8. Assuring compliance with all applicable civil rights requirements, including preparation of an equal employment opportunity plan and a fair housing resolution;
9. Attending (Town or City Council or County Commission) meetings to provide project status reports and representing the HOME/HTF project at any other public meetings deemed necessary; and
10. Preparing all required performance reports and closeout documents and assisting the (Town, City or County) with the determination of applicable audit requirements.

The services will not include the disbursement or accounting of funds distributed by the (Town's, City's or County's) financial officer, legal advice, fiscal audits, or assistance with activities not related to the HOME/HTF project.

Responses should include:

1. the firm’s legal name, address, and telephone number;
2. the principal(s) of the firm and their experience and qualifications;
3. the experience and qualifications of the staff to be assigned to the project
4. a description of firm’s prior experience, including any similar projects (in particular those funded by HOME/HTF), size of community, location, total construction cost, and name of local official knowledgeable regarding the firm’s performance. Include at least three references;
5. a description of the firm’s current work activities, how these would be coordinated with the project, and the firm’s anticipated availability during the term of the project; and
6. the proposed work plan and schedule for activities to be performed.

Respondents will be evaluated according to the following factors<sup>1</sup>:

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| 1. Quality of the Proposal   | ___% |
| 2. Consultant Qualifications and Experience (including reference checks) | ___% |
| 3. Availability and Capacity of the Consultant                           | ___% |

The selection of finalists to be interviewed will be based on an evaluation of the written responses. The award will be made to the most qualified offeror whose proposal is deemed most advantageous to the (Town, City, or County), all factors considered. Unsuccessful offerors will be notified in writing as soon as possible.

Questions and responses should be directed to (Mayor or Commissioner), (Address), (Town), Montana, (zip). All responses must be postmarked no later than (date). Please state “HOME/HTF Management Services Proposal” on the outside of the response package.

Respondents may review the HOME/HTF application which includes a description of the proposed project including activities, budget, schedule, and other pertinent information by visiting the (Town, City, or County) offices during regular office hours. A copy of the application is also available for review at the offices of the Community Development Division, Montana Department of Commerce, 301 S. Park Avenue, P.O. Box 200523, Helena MT 59620-0523.

This solicitation is being offered in accordance with federal and state requirements governing procurement of professional services. Accordingly, the (Town or City Council, or County Commission) reserves the right to negotiate an agreement based on fair and reasonable compensation for the scope of work and services proposed, as well as the right to reject any and all responses deemed unqualified, unsatisfactory or inappropriate.

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<sup>1</sup> HUD regulations require that RFPs “identify all evaluation factors and their relative importance.”