

## EXHIBIT 3-B

### SAMPLE FORMAT FOR REQUESTS FOR PROPOSALS FOR MANAGEMENT SERVICES

**Note:** The following is intended only as an example of a format which may be used to issue an RFP for project management services.

**Grantees should consider the content of their RFPs very carefully before they are issued. In particular, local officials should exercise care in drafting the scope of services and the factors to be used in evaluating proposals to assure that they are both complete and appropriate for your community and project.**

**See also Exhibit 3-F for a sample format for advertising the availability of the RFP.**

The (Town or City or County of) has been given a federal Community Development Block Grant (CDBG) 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 CDBG Program as described in the current edition of the Montana CDBG Program Grant Administration Manual. Payment terms will be negotiated with the selected offeror. The fee for project management services will be paid with CDBG 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 the DOC;
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 engineer, in conformance with applicable procurement requirements, including the preparation of a request for proposals;
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;
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 CDBG 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 CDBG 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 CDBG), 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.

**Note:** The evaluation factors listed below are only examples. Local officials should include any factors which they believe are appropriate to the work tasks to be involved, with relative weightings for each according to their priority. **HUD regulations require that the RFP "identify all evaluation factors and their relative importance."**

Respondents will be evaluated according to the following factors:

- |    |   |      |
|----|---|------|
| A. | Quality of the Proposal   | ___% |
| B. | Consultant Qualifications and Experience (including reference checks) | ___% |
| C. | 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 "CDBG Management Services Proposal" on the outside of the response package.

Respondents may review the CDBG 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.