*This Request for Proposals (RFP) template serves as one example for applicants and grantees to utilize in developing their own RFP for procuring professional services. This template was developed through drawing upon ‘best practices’ from various entities’ RFPs. It may be adapted to fit the Unit of General Local Government’s (UGLG’s) needs and local procurement and contracting policy specifications.*

*This template includes required and recommended CDBG language and Attachments for professional services contracts (refer to* ***Exhibit II****), including additional suggested language and Attachments that the UGLG may consider including for informational purposes if the services being provided will include administering or managing a project involving construction oversight, which may be subject to additional regulatory requirements regarding Affirmative Action, Equal Opportunity, Minority Business Enterprise/Woman Business Enterprise (MBE/WBE), Federal Labor Standards Provisions, Davis-Bacon and Related Acts (DBRA), and the Uniform Relocation Assistance and Real Property Acquisition Act (URA).*

*The project description, work scope/scope of services and deliverables, proposal requirements and content, RFP submittal, RFP and project deadlines, minimum qualifications and scoring criteria are all determined by the UGLG, and not specified by the CDBG Program. Note that CDBG Planning projects must be completed within 2 years of the CDBG award date. CDBG Projects involving construction must be completed within two construction seasons – refer the specific CDBG Program’s Application materials for additional project deadlines and criteria.*

**This RFP template may be adapted to meet the needs of the local government accordingly.**

**DELETE the “Template” language in the headers and footers, all yellow highlighting and red text (which denote fields to be customized by the UGLG and instruction/guidance for the UGLG in customizing the content) throughout this template, when customizing the document for the UGLG’s project.**

*Notes Regarding Competitive Procurement Requirements:*

*A competitive procurement process, such as using a Request for Proposals (RFP) process, is required when using CDBG funding to cover all or part of professional services costs (refer to Chapter 3 of the CDBG Implementation Handbook for exceptions). The RFP must be made publicly available in some way (e.g., posted on the UGLG’s website, advertised in the newspaper, posted on one or more professional association website(s), etc.). The RFP may be sent to particular firms to encourage participation, but sending it to particular firms* ***cannot******be in lieu of*** *making the RFP publicly available. The UGLG only needs to follow and comply with its local procurement/contracting policy(ies) when securing professional services that will* ***not*** *be paid with CDBG (or CDBG CLOSE) funding.*

*The solicitation of Grant Application Preparation and Grant Administration services, OR Grant Administration and CDBG-PLNG Project Planning services may be procured using one RFP procurement process, or may be separated into two RFP processes to procure each service separately. Application preparation related services and costs cannot be paid or reimbursed with CDBG funds. Engineering and Architectural services cannot be paid or reimbursed with CDBG funds (with the exception of CDBG CLOSE matching funds) and must be procured separately from Grant Administration services. Engineering and Architectural services may be procured using a separate RFP process or using a Request for Qualifications (RFQ) process. [Note: The RFQ process is only allowed for Engineering and Architectural services and cannot be used for any other type of professional services.]*

**Refer to Chapter 3: Procurement & Contracting in the** [**CDBG Implementation Handbook**](https://doa.wi.gov/Pages/LocalGovtsGrants/CDBGImplementationHandbook.aspx) **for additional requirements and guidance regarding professional services procurement and contracting.**

**[Municipality Type]**

**[County Name] County, Wisconsin**

**REQUEST FOR PROPOSALS (RFP)**

**For**

**[Type(s) of Service(s), e.g., Grant Administration, Planning Services [for CDBG-PLNG], etc.]**

**[Name of Project]**

**A Community Development Block Grant**

**[CDBG Program, e.g., Planning (CDBG-PLNG); Public Facilities (CDBG-PF); CLOSE Public Services (CL-PS); CLOSE Public Facilities (CL-PF); etc.] Project**

[Date]

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# Invitation to Submit Proposal

## Introduction

The [Municipality Name], Wisconsin, and/or its designated representative is seeking proposals for consulting services relating to the [Name of Project] [Type of Project, e.g., Planning, Public Facilities, CLOSE Public Services, etc.] Project. The [Municipality Name] is applying for federal funding from the Community Development Block Grant (CDBG) Program for this project. Proposals will be accepted for [List services being requested, e.g. “1) planning services to develop a [Type/Name of Plan]; and 2) grant administration services for a Community Development Block Grant (CDBG) award (contingent upon award)”]).

Minimum requirements include previous experience in [Type of Experience, e.g., type of Planning (e.g. Comprehensive Planning), study (e.g. Housing Studies), assessment (e.g., Senior Needs Assessment), and/or CDBG Grant Administration, etc.) on CDBG or similar state/federally funded projects. Proposals will be accepted from individuals, firms, or groups of firms with the demonstrated expertise and experience in these areas of practice.

## Contact Information

All interested persons and firms should contact [Contact Person’s Name], [Contact Person’s Title], between the hours of [Office Hours], [Days of Week, e.g., Monday-Friday] at [Contact Phone Number] or [Contact Email] to request the RFP packet or additional information, as needed.

Persons/firms that intend to submit a proposal should send notification of intent to the [Municipality Name] with the person’s/firm’s name and contact information in case of addenda or other changes. Additionally, the RFP may be sent to those persons/firms that are included on the [Municipality Name] persons/firms that is specifically created for this RFP. Those who the [Municipality Name] has sent an RFP and those who have provided contact information through a request for a copy of the RFP or through a notification of intent will receive all information regarding the RFP. The information may include, but is not limited to, any amendments to the RFP, answers to inquiries received regarding the RFP, or changes to the RFP schedule.

## Questions Regarding This RFP

This solicitation contains a description of the project and services required. Interested proposers have the responsibility of understanding what is required by this solicitation. During the review of the RFP, if the Proposer discovers any errors, omissions or ambiguities within the RFP, they should identify them in writing and call them to the immediate attention of the [Municipality Name] prior to the RFP submission deadline. The [Municipality Name] shall not be held responsible for any person’s/firm’s lack of understanding of the project.

Questions for clarification concerning this RFP must be in writing and received via [list method(s), e.g., U.S. Mail and/or email] to [Contact Person’s Name], [Contact Person’s Title], at [Contact Email] on or before [Day], [Date]. After this date, questions involving the content or intent of the proposal will not be answered. All questions will be responded to by [Contact Person’s Name], [Contact Person’s Title], in writing via email, and provided to all parties requesting an RFP for which the [Municipality Name] has the contact information, and treated as an addendum to the RFP packet.

The [Municipality Name] makes no representations as to the conditions of the project other than those representations made herein, and no employee or any other representative of the [Municipality Name] has the authority to make any oral or written representations as to the conditions of the project. Persons/firms should only contact the person designated above regarding this RFP and should not contact the [Municipality Type] [Chief Elected Official (CEO) Title], any [Municipality Type] [Municipality Governing Body Name, e.g. Tow/Village/County Board, City Council, etc.] members, any committee members, or any other [Municipality Name] staff for clarification on this RFP.

## Addenda Interpretations

If it becomes necessary to revise any part of this RFP, a written addendum will be provided. The [Municipality Name] is not bound by any oral clarifications changing the scope of the work for this project. All addenda issued by the [Municipality Name] will become part of the official RFP and will be emailed to all Proposers of record based upon contact information on record at the original time of issuance or subsequently provided.

# Scope of Services & Deliverables

The [Municipality Name], [County Name] County, Wisconsin is applying for federal funding from the Community Development Block Grant (CDBG) Program for the [Name of Project and Type of CDBG Project, e.g. Downtown Revitalization Planning Project, Main Street Infrastructure Improvements Public Facilities Project, etc.].

The focus of the [Type of Project, e.g., planning, public facilities, public services, etc.] project will be to [State Overall Goal/Intention/Focus of the Project] that will include [General Description of Plan/Project Activity(ies)] for the [Municipality Name] in [County Name] County, Wisconsin.

**[Municipality Name] Community & Project Area Description:**

[Enter Description of the Municipality/Community and Project Area. May copy from CDBG Application and/or include CDBG Application in the **Exhibits** section of the RFP, if the Application has been prepared and/or submitted. May include Location of Project and/or Type of Population on which it will focus, if not a Community-Wide Plan/Study/Assessment or Other Type of Project. For a Plan/Study/Assessment or Other Type of Project that is for a Specific Site/Location or Area, enter Location Address(es) and/or Description of Geographic Area (e.g., coordinates, land plots, characteristics/features, census tracts, etc. as applicable) that will be the Focus of the Plan/Study/Assessment or Other Type of Project. For a Plan/Study/Assessment or Other Type of Project that is for a Specific Population, enter the Population Description for the Geographic Area in which the Population resides (using demographic data from local records, U.S. Census, etc.). Otherwise, indicate the Project will be a community-wide Plan/Study/Assessment or Other Project Type] in the [Municipality Name] and enter a Description of the Community-Wide Geographic Area.]

**Project Background:**

[Enter Background Information on Purpose of and Need for Project. May copy from CDBG Application and/or include CDBG Application in the **Exhibits** section of the RFP, if the Application has been prepared and/or submitted.]

Background information materials and a Project Area/Service Area Map for the proposed [Name of Project] Project location are provided in **Exhibit I** attachments.

*[Type of Services/Activities, e.g., Planning] Services*

Refer to the project background. The selected person(s)/firm(s) will conduct activities for and complete a [Type of Project], including the following:

[Enter Expected Tasks, Responsibilities, Outcomes, Etc. – Examples for CDBG-PLNG Project Planning Activities are Shown Below:

* Establishing a work plan and budget for the Project
* Conducting the [Planning/Study/Assessment]
* Soliciting resident and public input
* Coordinating meetings for the Project, including a kick-off meeting; community member/public and stakeholder meetings; regular progress meetings with the [Municipality Name] [Municipality Governing Body Name]; and a final presentation meeting
* Communicating on an ongoing and periodic basis with residents, constituents and other stakeholders during the Project
* Regularly interfacing with members of the [Municipality Governing Body Name] and [Municipality Name] staff concerning approaches and tasks through the Project, through meetings, telephone calls and emails
* Maintaining hardcopy and/or electronic copies of all records, data collected, maps, photos, analyses, and documentation generated for the Project; providing them to the [Municipality Name] as requested during and upon completion of the Project
* Developing and providing to the [Municipality Name] a formal typed report, which includes an Executive Summary and full reporting of the [Plan/Study/Assessment] process and findings/recommendations
* Presenting the findings and recommendations from the [Plan/Study/Assessment] (in a Microsoft PowerPoint presentation) to the public at a scheduled meeting of the [Municipality Name] [Municipality Governing Body Name]
* Providing [#] of copies of the final report to the [Municipality Name]
* Complying with CDBG regulations and policies applicable to the Project.

The final [Plan or Study/Assessment Report] must be completed [Enter # of Months or Specific Target Completion Date] of the Planning contract award date.]

*[Type of Services/Activities, e.g., Grant Administration] Services*

The selected person(s)/firm(s) will serve as and perform the functions of the [Enter Role, e.g. Grant Administrator] for a Community Development Block Grant award [ADD “(contingent upon award)” if the CDBG Award has not yet been made to the UGLG], including the following:

[Enter Expected Tasks, Responsibilities, Outcomes, Etc. – Examples for Grant Administration Services are Below:

* Preparing and submitting CDBG contract and amendment documents, as applicable
* Managing the CDBG Project records
* Preparing and submitting applicable Environmental Record documents for the CDBG Project
* Coordinating Citizen Participation meeting(s) and maintaining and submitting required records for Citizen Participation for the CDBG Project
* Completing compliance activities for CDBG Project acquisition/relocation compliance as applicable [Not Applicable for some CDBG projects, e.g., CDBG-PLNG – Do Not Include if N/A]
* Completing compliance activities for CDBG Project federal labor standards as applicable [Not Applicable for some CDBG projects, e.g., CDBG-PLNG, CDBG-CLOSE Public Services, etc. – Do Not Include if N/A]
* Preparing and submitting CDBG reporting documents for the CDBG Project, including but may not be limited to Semi-Annual Reports, Single Audit Statements, Section 3 Reports, Equal Opportunity/Minority Business Enterprise/Women Business Enterprise (MBE/WBE) Reports, Labor Standards Reports [include only if applicable].
* Preparing and submitting CDBG monitoring documents and responding to monitoring requirements as applicable for the CDBG Project.
* Managing financial records for the CDBG Project and preparing and submitting CDBG requests for payment and related required documentation.
* Attending and participating in [Municipality Name] [Municipality Governing Body Name] meetings as necessary for the CDBG Project.
* Preparing and submitting the CDBG Project Completion Report and supporting documents.
* Complying with CDBG regulations and policies applicable to the Project.

All work to be undertaken as part of this proposed program must be undertaken in accordance with the Federal Code of Federal Regulations, including but not limited to 24 CFR, Part 570 and 24 CFR, Part 58; and other applicable State and Federal requirements. Federal requirements for CDBG projects regarding Conflicts of Interest, Lobbying, and Section 3 [SUGGESTION: ADD FOR GRANT ADMINISTRATION OF CONSTRUCTION PROJECTS (For Informational Purposes): Affirmative Action, Equal Opportunity, Minority Business Enterprise/Woman Business Enterprise (MBE/WBE), Federal Labor Standards Provisions, and Davis-Bacon and Related Acts (DBRA)] are provided in **Exhibit II** attachments included with this RFP. [Consider also adding for a construction project if applicable: “The project may also include Acquisition and Relocation activities, which are subject to the Uniform Relocation Assistance and Real Property Acquisition Act (URA),” if the Grant Administrator will be handling any Acquisition or Relocation activities.] Applicable requirements must be met by the selected entity for this RFP, and any entities awarded a contract or subcontract for the CDBG Project.]

# Proposal Requirements

## Directions for Submittal

Proposals must be received at the [Municipal Building Name, e.g., Village Hall]. Direct submittals to [Contact Person Name], [Contact Person Title], [Municipality Name], labeled “ATTN: [Name of Project] [Type of CDBG Project, e.g. Planning, Pubic Facilities, etc.] Project RFP Review Committee”, [Mailing Address]; or via email to [Email Address], with the Subject of “ATTN: [Name of Project] [Type of CDBG Project, e.g. Planning, Pubic Facilities, etc.] Project RFP Review Committee”, no later than [Time] on [Day], [Deadline Date]. The [Municipality Name] reserves the right to reject any and all Proposals not meeting the requirements of this Request for Proposals for consulting services.

Persons requesting ADA assistance accommodations for hearing and speech impaired may contact [Contact Person Name], [Contact Person Title] at [Contact Phone Number] or [Contact Email Address].

Individuals/firms interested in being considered for this project must submit a proposal detailing qualifications, technical expertise, management and staff capabilities, related prior experience, and a detailed cost estimate for the Scope of Services described above. The objective of the competitive process is to objectively select the firm that will provide high-quality, efficient, and cost-effective services. The selected person(s)/firm(s) will be invited to contract with the [Municipality Name] for consulting services.

**Exhibit III**, attached to this RFP, represents the qualifications sought for the [Type of Services, e.g., Planning, Grant Administration, etc.] consulting services. These criteria have been established to assure the Community of professional expertise with adequate experience and capacity to ensure successful completion of the proposed project within the allocated time constraints.

**Exhibit IV**, attached hereto, is a Rating System that will be utilized for selection of the consultant. This rating system will be employed by the community in determining which proposal best meets the needs as outlined in this RFP.

## Proposal Contents

[List Proposal Contents Required – Examples Based on Contents of This Template Are Listed Below:

1. Cover Letter.
2. Project scope statement describing the work to be undertaken, include the services outlined in the RFP, and any modifications or expansion of the scope provided in order to deliver the [Type of Services, e.g., Planning, Grant Administration, etc.] consulting services.
3. Project work plan indicating mechanisms proposed to coordinate the work effort with the [Municipality Name].
4. Project coordination plan indicating mechanisms proposed to coordinate the work effort with the [Municipality Name].
5. Proposer’s profile and a clear concise statement with:
   1. Examples indicating past performance and familiarity with the type of work detailed in the RFP
   2. Examples of implementation of the Proposer’s work/services in other communities and noted successes
   3. A list of client references for which Proposer provided similar services as described in the RFP.
6. Project team statement indicating the professional and technical qualifications of the key persons who will be assigned to the project and their responsibilities within the Scope of Services. Resumes for key personnel should be included in the proposal appendices.
7. Project budget with estimated level of effort for each member of the team and for each major task.
8. Fee schedule for personnel involved with the project.
9. Copy of professional services agreement.]

## Proposal Format

[Enter Proposal Format Required – Example Based on Content of this RFP Template is Shown Below:

The proposal must be submitted in typed format with the items to be included in the proposal placed in the same order as described in above. The proposal must be signed by the submitter or authorized representative and dated. The pages of the proposal must be numbered in consecutive order and should not exceed the maximum sheet size of 8.5” x 11.” The name, mailing address, phone number and email address of the Proposer should be placed in the upper left corner on the cover page of the Proposal.]

## Selection Process Schedule

The [Municipality Name] anticipates authorizing a contract for this work in [Month and Year] with a notice to proceed no later than [Month and Year]. The scope of services will take place over [Number of Months]-month period. The [Municipality Name]’s goal is to have the [Name of Project] [CDBG Project Type, e.g., Planning, Public Facilities, etc.] project completed no later than [Project Completion Project Deadline Date]. Responding persons/firms should comment on the above schedule as part of their proposal and state how realistic it is to achieve substantial completion of the work by [Deadline Date].

## Other Conditions of Proposal Submittal

1. Only one proposal will be accepted from any person, firm or entity.
2. No proposal will be accepted from any person, firm or entity that is in arrears for any obligation to the [Municipality Name], is debarred from contracting for federally funded projects, or that otherwise may be deemed irresponsible or unresponsive by the [Municipality Name] [Governing Body Name] or [Municipality Name] staff.
3. All Proposals submitted become public information and may be reviewed by anyone requesting to do so at the conclusion of the evaluation process.
4. Requirements and conditions of employment and contracting to be observed for compliance with Conflict of Interest, Lobbying, and Section 3 [SUGGESTION: ADD FOR CONSTRUCTION PROJECTS ONLY (for informational purposes to inform the Grant Administrator of regulations that will apply to the construction contractors of the project): Affirmative Action, Equal Opportunity, Minority-Business Enterprise/Women Business Enterprise (MBE/WBE), Federal Labor Standards, and Davis-Bacon and Related Acts (DBRA)] regulations apply to this project.

Refer to **Exhibit II** attachments for the CDBG Project requirements.

# Evaluation and Selection

Final selection of the planning and grant administration provider will be based upon the maximum total points scored as set forth in the Rating System in **Exhibit IV**.

The [Municipality Name] reserves the right to negotiate a contract with the services provider selected to perform the professional services required.

The [Municipality Name], [County Name] County, Wisconsin reserves the right to reject any and all responses submitted. If you have any questions regarding this Request for Proposals, please contact:

[Contact Person Name]

[Contact Person Title]

[Contact Email Address]

[Contact Phone Number].

# EXHIBIT I

## Project Background and Project Area/Service Area Maps

**REFER TO ATTACHMENTS FOR:**

**PROJECT BACKGROUND DOCUMENTS**

**PROJECT AREA / SERVICE AREA MAPS**

**[ADD APPLICABLE ATTACHMENTS]**

# EXHIBIT II

## State and Federal Regulatory Requirements for CDBG-Assisted Projects

**REFER TO EXHIBIT II ATTACHMENTS FOR:**

***LIST AND ADD APPLICABLE ATTACHMENTS TO THIS RFP EXHIBIT; OR SIMPLY LIST AND REFER APPLICANTS TO THE WEBSITE LINK BELOW FOR THE APPLICABLE ATTACHMENTS.***

1. POTENTIAL CONFLICT OF INTEREST DISCLOSURE [INCLUDE DISCLOSURE FORM – EXAMPLE THAT MAY BE MODIFIED/CUSTOMIZED IS ATTACHMENT 3-B IN CDBG IMP. HANDBOOK]
2. CONCFLICT OF INTEREST CLAUSE [INSERT FROM ATTACHMENT 3-C IN CDBG IMP. HANDBOOK]
3. LOBBYING CERTIFICATION [INSERT FROM ATTACHMENT 3-D IN CDBG IMP. HANDBOOK]
4. DISCLOSURE OF LOBBYING ACTIVITIES [INSERT FROM ATTACHMENT 3-E IN CDBG IMP. HANDBOOK]
5. SECTION 3 CLAUSE [INSERT FROM ATTACHMENT 6-B IN CDBG IMP. HANDBOOK]
6. AFFIRMATIVE ACTION CLAUSE \*[FOR CONSTRUCTION PROJECTS ONLY; INSERT FROM ATTACHMENT 6-C IN CDBG IMP. HANDBOOK]
7. EQUAL OPPORTUNITY CLAUSE [FOR CONSTRUCTION PROJECTS ONLY; INSERT FROM ATTACHMENT 6-D IN CDBG IMP. HANDBOOK]
8. MINORITY BUSINESS ENTERPRISE/WOMAN BUSINESS ENTERPRISE WEB RESOURCES \*[FOR CONSTRUCTION PROJECTS ONLY; INSERT FROM ATTACHMENT 7-R IN CDBG IMP. HANDBOOK]
9. DAVIS-BACON AND RELATED ACTS CLAUSE \*[FOR CONSTRUCTION PROJECTS ONLY; INSERT FROM ATTACHMENT 7-B IN CDBG IMP. HANDBOOK]
10. FEDERAL LABOR STANDARDS PROVISIONS \*[FOR CONSTRUCTION PROJECTS ONLY; INSERT FROM ATTACHMENT 7-G IN CDBG IMP. HANDBOOK]

***\*THE LANGUAGE/ATTACHMENTS LISTED AS “FOR CONSTRUCTION PROJECTS ONLY” ARE SUGGESTED FOR INFORMATIONAL PURPOSES, INFORMING THE GRANT ADMINISTRATOR OF THE REGULATIONS THAT WILL OR MAY BE APPLICABLE TO THE CONSTRUCTION ACTIVITIES FOR THE PROJECT. THE CONSTRUCTION PROJECT-ONLY ATTACHMENTS/LANGUAGE INSERTS ARE NOT REQUIRED FOR PROFESSIONAL SERVICES CONTRACTING BUT THE GRANT ADMINISTRATOR MAY HAVE RESPONSIBILITIES FOR HELPING ENSURE THE UGLG’S COMPLIANCE TO THESE REGULATIONS FOR A CDBG PROJECT INVOLVING CONSTRUCTION.***

**THE CDBG ATTACHMENTS LISTED ABOVE [ENTER “ARE FROM” IF ATTACHED, OR ENTER “MAY BE OBTAINED FROM” IF THEY ARE NOT ATTACHED AND NEED TO BE OBTAINED BY THE PROPOSER] THE CDBG IMPLEMENTATION HANDBOOK AND HANDBOOK CHAPTER ATTACHMENTS ON THE**

**BUREAU OF COMMUNITY DEVELOPMENT WEBSITE AT:**

<https://doa.wi.gov/Pages/LocalGovtsGrants/CDBGImplementationHandbook.aspx>

# EXHIBIT III

## Minimum Qualifications

1. The person(s)/firm(s) must have successfully provided [Types of Services, e.g., Planning, Grant Administration, etc.] services for a minimum of [# of Projects, e.g., 1-5 is typical] similar type projects. The person/firm may not be selected if there have been any unresolved issues relative to the services provided.
2. The principal responsible for coordination of the [Types of Services, e.g., Planning, Grant Administration, etc.] must have a minimum [# of Years, e.g., 1-5 is typical] years of experience with this specific type of work.
3. The principal responsible for provided [Types of Services, e.g., Planning, Grant Administration, etc.] must have a minimum of [# of Years, e.g., 1-5 is typical] years of experience with the CDBG Program ***or*** other federal/state funded programs or projects.
4. The person(s)/firm(s) must submit references as to their professional qualifications from a minimum of [# of Clients, e.g., 2-3 is typical] previous clients for which the person(s)/firm(s) has/have performed work (include contact name, title, firm/organization/government name, email address, mailing address and telephone number).

# EXHIBIT IV

## Selection Rating System

**[Scoring Criteria and Assigned Points May Be Modified and Adjusted to Meet UGLG’s Needs and Preferences. Points for MBE/WBE/DBE and Section 3/LMI firms is strongly recommended to meet equal opportunity, MBE/WBE and Section 3 outreach efforts requirements for the CDBG Program.** **The Example below represents scoring when the highest score for years of experience and # of projects experience are set at 3 years/3 projects – scoring levels should match criteria noted in Exhibit III.]**

1. Project Coordinator/Lead's Experience Maximum 20 Points
2. 3 or more years experience with CDBG or other federal/state 20 Points

programs

1. 2 years experience 15 Points
2. 1 years experience 10 Points
3. Less than 1 year experience 5 Points
4. No experience 0 Points
5. Firm’s Project Completion Background Maximum 20 Points
6. Completion of 3 or more previous, similar type projects within 20 Points

proposed time frame & budget

1. Completion of 2 similar projects 15 Points
2. Completion of 1 similar project 10 Points
3. Working on 1 similar project; not completed 5 Points
4. No work on a similar project 0 Points
5. References from Similar Projects Maximum 20 Points
6. Respondent lists 3 previous clients with similar projects 20 Points

and all references give excellent response on quality of service

1. Respondent lists 2 previous clients 15 Points
2. Respondent lists 1 previous client 10 Points
3. Respondent lists no previous references 0 Points
4. Firm’s Familiarity with Community’s Needs Maximum 10 Points
5. Firm is thoroughly familiar with community(ies) with 10 Points

similar population and characteristics to

[Municipality Name]

1. Firm is somewhat familiar with community(ies) with 5 Points

similar population and characteristics to

[Municipality Name]

1. Firm is unfamiliar with community(ies) with 0 Points

similar population and characteristics to

[Municipality Name]

1. Responsiveness to Specifications of Project/RFP Maximum 20 Points
2. Needs of project are fully addressed in Proposal 20 Points
3. Needs of project are somewhat addressed in Proposal 10 Points
4. Needs of project are not addressed/resolved in Proposal 0 Points
5. Cost Effectiveness Maximum 10 Points
6. Budget/proposal includes 3 or more cost effectiveness 10 Points

Components

1. Budget/proposal includes 1-2 cost effectiveness components 5 Points
2. Budget/proposal does not include cost effectiveness components 0 Points
3. Budget Maximum 10 Points
4. Budget within [Municipality Name]’s 10 Points

capacity as proposed

1. Budget slightly above [Municipality Name] ’s 5 Points

capacity as proposed;

potentially feasible with modest adjustment

1. Budget not reasonably within [Municipality Name]’s 0 Points

capacity as proposed; would require extensive

adjustment to be feasible

1. Minority or Women Business Enterprise, Disadvantaged Maximum 5 Points

Business Enterprise, or Section 3/LMI Firm\*

1. Firm is MBE, WBE, DBE or Section 3/LMI firm 5 Points
2. Firm is not MBE, WBE, DBE or Section 3/LMI firm 0 Points
3. Small Business Firm Maximum 5 Points
4. Firm is a small business 5 Points
5. Firm is not a small business 0 Points

**MAXIMUM TOTAL POINTS: [# of Points; e.g. 120 using criteria in this template] POINTS**

**Note to Responders of RFP:**

***Proposal submittals are to be organized to address the submittal specifications listed in the RFP and the evaluation criteria listed above.***

*\*MBE/WBE/DBE and Section 3/LMI Firms are Defined As Follows:*

Minority Business Enterprise (MBE) – Business with at least 51% ownership and control held by minority person(s).

Woman Business Enterprise (WBE) – Business with at least 51% ownership and control held by a woman or women.

Disadvantaged Business Enterprise (MBE) – Small business with at least 51% ownership and control held by person(s) classified as “disadvantaged” individual(s) according to the Wisconsin Department of Transportation standards (<https://wisconsindot.gov/Documents/doing-bus/civil-rights/dbe/dbe-program-brochure.pdf>)

Section 3/LMI Firm – Firm with at least 51% ownership interest and control held by low-to-moderate income (LMI) Wisconsin resident(s) (LMI according to HUD LMI limits for the County in which the owner resides); *or* at least 30% of the firm’s full-time permanent employees are Wisconsin LMI residents (LMI based on the HUD LMI income limits for the County in which they live); *or* the owner(s) of the firm commit(s) to awarding at least 25% of its subcontracting dollar amount (i.e., 25% of subcontracting, based on the total amount of subcontracts awarded) to Section 3/LMI firms for the CDBG project.

**[TYPE OF SERVICES, e.g., PLANNING, GRANT ADMINISTRATION, etc.]** **SERVICES**

**PROVIDER SELECTION CERTIFICATION**

**BY [MUNICIPALITY NAME]**

[NAME OF PROJECT] PROJECT

[Municipality Name]

[County Name] County, Wisconsin

**TOTAL POINTS**

**[Scoring Criteria May Be Modified and Adjusted to Meet UGLG’s Needs and Preferences.]**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **CRITERIA** | | **POINTS AWARDED** | | | |
|  |  | [Proposer /Firm Name] | [Proposer/Firm Name] | [Proposer/Firm Name] | [Proposer/Firm Name] |
| 1. | Project Coordinator’s/Lead Person’s Experience |  |  |  |  |
| 2. | Firm’s Project Completion Background |  |  |  |  |
| 3. | References from Similar Projects |  |  |  |  |
| 4. | Firm’s Familiarity with Community’s Needs |  |  |  |  |
| 5. | Responsiveness to Project/RFP Specifications |  |  |  |  |
| 6. | Cost Effectiveness |  |  |  |  |
| 7. | Budget |  |  |  |  |
| 8. | MBE/WBE/DBE or Section 3/LMI Firm |  |  |  |  |
| 9. | Small Business Firm |  |  |  |  |
|  | **TOTAL POINTS:** |  |  |  |  |

*Signed Upon Completion of Proposal Review and Selection:*

Certification: I hereby certify that the [Municipality Name], [County Name] County, Wisconsin selection committee reviewed all proposals from eligible responders/submitters of proposals. The proposals were evaluated and ranked based on the information provided in the proposal documents and the criteria set forth above.

Date

[Typed Chief Elected Official Name], [Typed Chief Elected Official Title]

[Municipality Name]

***[Have CEO Sign and Date This Document in the Spaces Provided Above]***

***[Click on the Table of Contents at the start of this RFP document to “Update Fields” when finished with customizing the document for the UGLG’s project.]***