

**Request for Proposals  
For  
Grant Preparation, Administration  
And Grant Management  
Services**

**2019 Community Development Block Grant Projects**

*by the*  
**Chesterfield Select Board**

Copies of the RFP are available at the Town Administrator's office beginning Wednesday, November 7, 2018 or by calling the Town at (413) 296-4771. RFPs are available electronically upon request.

The Town must receive your organization's response at their offices at Chesterfield Town Office Building, 422 Main Road, PO Box 299, Chesterfield, MA by 4:00 pm. on Tuesday, November 20, 2018. **Postmarks will not be considered.** Proposals submitted by fax or by electronic mail will not be considered.

*Contact:*                      *Susan M. Labrie, Town Administrator*  
*Town of Chesterfield*  
*422 Main Road, PO Box 299*  
*Chesterfield, MA 01012*  
**Phone: (413) 296-4771 ext. 1#**  
**Fax:     (413) 296-4394**

*This project is funded by a grant from the Massachusetts Department of Housing & Community Development through a grant from the U.S. Department of Housing and Urban Development.*

**TOWN OF Chesterfield**  
INCORPORATED 1762  
OFFICE OF CLERK, TREASURER, SELECTMEN,  
ASSESSORS AND TAX COLLECTOR  
422 Main Rd  
Chesterfield, MASSACHUSETTS 01012  
TELEPHONE: (413) 296-4771  
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## **Request for Proposals (RFP)**

### **A. INVITATION**

The Town of Chesterfield seeks proposals from organizations/consultants for grant management services for its 2019 Community Development Block Grant (CDBG) funded programs/projects. Potential projects include a housing rehabilitation program, and social services program administration for the potential towns to be served by this regional CDBG grant which may include: Chesterfield, Cummington, Goshen, Peru, Plainfield, Williamsburg, Westhampton, and Worthington. The program is funded through a grant from the Massachusetts Department of Housing & Community Development (DHCD) CDBG Program using U.S. Dept. of Housing and Urban Development (HUD) funds. This is not a price competition, but rather the Town's decision will be based upon its review of the applicant's qualifications and experience in managing and administering CDBG-funded projects.

The Town must receive your organization's response at their offices at 422 Main Road in Chesterfield by 4:00 p.m. on November 20, 2018. **Postmarks will not be considered.** Proposals submitted by fax or by electronic mail will not be considered.

Five (5) copies of your proposal must be submitted in a sealed envelope indicating the applicant's name and address. The envelope must be marked in the lower left-hand corner with the following legend: ***CDBG Proposal***

- I. APPLICATION PREPARATION:** The consultant/organization will prepare, complete and submit an application for the Community Development Block Grant regional funding opportunity on behalf of the Town of Chesterfield. This regional grant will likely include some combination of the towns of Chesterfield (lead town), Cummington, Goshen, Peru, Plainfield, Westhampton, Williamsburg and Worthington. Successful candidates will review the Community Development Strategy in each town to determine levels of need (if needed), advertise and attend public hearings, procure social service providers and complete all plans and certifications required by DHCD policy. In addition, narratives for each project selected for inclusion by the town must be completed including required appendices, proposed budgets and an implementation plan. All activities related to the application preparation must adhere to a strict deadline.

**II. COMPLETE GRANT MANAGEMENT SERVICES:** The consultant/organization will provide complete grant management services associated with HUD/DHCD funding for the 2019 CDBG funded activities, including but not limited to administering a housing rehabilitation program in the aforementioned towns, and administering up to five social services programs serving the multi-town region. The consultant/organization hired will work with town staff, Selectboard members, other town officials, with consultants retained by the Town, and with any citizen advisory groups involved with the CDBG-funded projects.

**DETAILED DESCRIPTION OF SERVICES REQUESTED**

The consultant's/organization's statement of qualifications for GRANTS MANAGEMENT services should detail specific grants management experience, particularly with DHCD/HUD funded projects. The statement should include a description of experience with the following tasks:

- Provide Project Delivery Services as required by DHCD for Housing Rehabilitation, and Program Delivery for all Social Service activities
- Environmental Review Clearance and Special Condition Response
- Grant start-up procedures and program implementation
- Preparation and submission of Quarterly Reports
- Preparation and submission of Drawdown Requests
- Recording of all the following into DHCD's Grant Management System (GMS): all expense activity, drawdown activity, Program Income activity, all Project, Contract, Budget, and Applicant activity
- Other maintenance of GMS as required
- Project and Budget monitoring for all activities
- Prepare periodic Project Status reports as needed and requested by Selectboard
- Approval, payment and processing of bills
- Monitoring for National Objectives
- Experience working with selectboard members and town staff
- Project Close-Out procedures
- Maintain compliance with all local, state, and federal regulations
- Successful grant writing experience
- Participation in any related program or financial audits

**B. GENERAL CONDITIONS**

1. The successful applicant shall comply with all applicable federal, state and local laws and regulations, particularly HUD regulations and administrative procedures, including the ability to acquire the necessary insurance - must not be debarred from state or federal projects.
2. Purchases made by the Town are exempt from sales taxes and bid prices must exclude any taxes. The Town will provide tax certificates.
3. Verbal orders are not binding on the Town and work done without formal Purchase Order or Contract is at risk of the Seller or Contractor and may result in an unenforceable claim.

4. The Town of Chesterfield reserves the right to reject proposals, to waive technicalities, to advertise for new proposals, and to make awards as may be deemed in the best interests of the Town. The Town will award the contract or contracts within thirty (30) business days after the opening of the proposals.
5. Reports and materials submitted to the Town are public information and may not be copyrighted.
6. All proposals become the property of the Town. The Town has the right to disclose information contained in the proposals once awards have been made.

### **C. CONTRACT PERIOD**

The contract period shall begin approximately December 1, 2018 for CDBG FY19 grant preparation services and if funded, will continue through December 31, 2020 for administrative and grant management services. The contract or contracts may be extended with the approval of the Town and/or DHCD.

### **D. PRICES**

Price or the fee is not a consideration with this proposal. The fee for GRANTS ADMINISTRATION will be the amount approved by DHCD for general and project administration.

### **E. SPECIFICATIONS**

The following items must be included in all proposals for **GRANT MANAGEMENT** services:

1. An outline of direct experience in managing similar projects funded by Town or CDBG funding, including examples of the applicant's similar projects.
2. Description of the background of the organization/consultant, including grant management experience.
3. Identification, experience and qualifications of the staff that will be assigned to the project, and their experience. Applicant must have administrative and grant administrative capacity.
4. A list of the functional areas, staff assigned to each area, their qualifications, and attached resumes of key individuals.
5. Percentage of time anticipated to be spent by task by key individuals in the organization.
6. At least three (3) professional references for projects, including address and phone numbers.
7. Certificate of compliance with local, state, and federal tax laws (forms attached).
8. Certificate of Non-collusion (forms attached).
9. Identification of experience working with towns to assist in preparing strategies for funding opportunities and seeking funding for the projects.
10. Experience developing design and community consensus on public projects. Identify work involving Citizen Advisory Committees.
11. Professional liability insurance for principals involved in the project.

### **F. EVALUATION CRITERIA**

All proposals will be evaluated based upon minimum and comparative criteria. The Town will award a contract or contracts for this project to the organization(s) or individual(s) who submit(s) the most advantageous proposal(s) based on consideration of specified evaluation and selection

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criteria. After evaluating the minimum required criteria, the Town will then evaluate the proposals using the comparative evaluation criteria. The Town may, at its own discretion, schedule interviews after reviewing the proposals. The Town will award the contract or contracts to the organization(s) with the highest combined score.

**1. Minimum Criteria:**

**A. Grant Management.** Each proposal for GRANT MANAGEMENT must meet all the following criteria in order to be considered for further evaluation:

- \_\_\_\_ Organization/Consultant must have at least three (3) years of grant management experience.
- \_\_\_\_ Organization/Consultant must have experience managing two or more of the following components using CDBG funding: municipal community facilities construction projects, housing rehabilitation, planning projects and social services delivery.
- \_\_\_\_ Provide three (3) professional references for similar projects, including names, addresses, phone numbers and a description of projects the proponent worked on, their costs, and funding sources.
- \_\_\_\_ Show successful working relationship with town government and contractors as demonstrated in the organization’s statement of qualifications.
- \_\_\_\_ Successful experience working with citizen groups, town boards and Selectboards.
- \_\_\_\_ Show successful working relationship with Town government and contractors as demonstrated in the organization’s statement of qualifications.
- \_\_\_\_ Successful experience working with citizen groups, Town boards and Select Board.

**2. Comparative Criteria:** The following rating will be used on those organizations who meet the minimum evaluation criteria listed above. Those proposals that do not meet the minimum will be judged unacceptable and not reviewed any further. If an applicant scores a zero (0) on any of the comparative criteria the Town will consider their proposal(s) unacceptable and may elect to not review the proposal(s) any further. The Town will consider the following comparative criteria and award each criterion on the following point schedule:

- |                                   |   |
|-----------------------------------|---|
| <b><i>Highly Advantageous</i></b> | (5 points) proposal excels or exceeds the criteria  |
| <b><i>Advantageous</i></b>        | (3 points) proposal meets evaluation standard for the criteria  |
| <b><i>Not Advantageous</i></b>    | (1 point) proposal does not fully meet the criteria or leaves a question or issue not fully addressed   |
| <b><i>Does Not Meet</i></b>       | (0 points) proposal does not address the criteria – <b><i>proposal is automatically eliminated from further consideration if a zero (0) is received in any category</i></b> |

The criteria that will be used for comparative purposes for GRANT MANAGEMENT proposals are outlined below. Organization/Consultant’s work examples will be evaluated in comparison to any examples submitted for similar projects. Your grant management experience will be compared to any other submissions.

**A. SCORE FOR BLOCK GRANT MANAGEMENT EXPERIENCE**

A. Block Grant Management Planning Experience will be demonstrated in the organization/consultant's outline of previous work on similar projects. The qualifications statement should outline the organization/consultant's experience with HUD financed projects and/or outline experience serving in this capacity on other projects and with other communities.

***Evaluation Criteria:***

Highly advantageous - Management (5 points): organization/consultants who have direct experience in similar projects involving housing rehabilitation loans, and social services program administration, or at least strong working experience with HUD-funded projects. Minority, women-owned and Section 3 qualified firms or members of the team who are minorities or women will be considered highly advantageous to the Town. Also considered highly advantageous are organizations/consultants that demonstrate an understanding of the multi-town rural target area, have direct experience with CDBG-funded projects, and articulate their understanding of the Chesterfield CDBG projects based upon experience, background and examples.

Advantageous - Management (3 points): organization/consultants with significant grant management experience in at least two of the CDBG grant project areas (municipal community facilities construction, housing rehabilitation, senior housing planning, social services administration).

Not Advantageous (1 point): organization/consultants who demonstrate an understanding of the RFQ and the scope of services (simply address/and or repeat the RFQ conditions).

Does not meet the criteria (0 points – eliminated): organization/consultants who do not demonstrate a clear understanding of the scope of services or the target communities throughout their proposal will be considered to have no advantage to the project. Organization/Consultants with no direct HUD project experience will be considered to have no advantage to the project.

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**B. SCORE FOR QUALITY OF GRANT MANAGEMENT SKILLS**

B. Quality of Grant Management Skills will be demonstrated by the quality of the consultant's staffing plan and methodology.

***Evaluation Criteria:***

Highly advantageous - grant management (5 points): the organization/consultant's plan of services proposes a detailed, logical and highly efficient scheme for producing a complete project that addresses all of the required components.

Advantageous (3 points): the organization/consultant's plan of services proposes a credible scheme for producing a complete project that addresses all of the required components.

Does not meet the criteria (0 points – eliminated): the organization/consultant's plan of services is not sufficiently detailed to evaluate, or the plan does not contain all the components necessary to produce a complete project or address all the required components.

### **C. SCORE FOR QUALITY OF REFERENCES**

C. Quality of References. Responses from references will be evaluated to identify the ability of the individual/organization to meet project goals and timetable, and to complete projects within budget, with particular attention to CDBG projects similar to those in this grant and to projects conducted with public participation. (The organization/consultant may provide written recommendations in their proposals to assist the Town in its evaluation of this section.)

***Evaluation Criteria:***

Highly advantageous (5 points): all references indicate that the organization/consultant's project(s) were completed on schedule or with minimal, insignificant delays. All references also indicate that organization/consultant's project(s) met national objectives, and were completed within budget – exceeds the criteria

Advantageous (3 points): only one of the organization/consultant's references indicates that the organization/consultant's project(s) were completed with significant delays, and no current project or project completed in the last three years experienced substantial delays attributable to the organization/consultant. At least one of the references also indicates that organization/consultant's project(s) met national objectives and were completed within budget – meets the criteria.

Not Advantageous (1 point): two of the organization/consultant's references indicate that the consultant's project(s) were completed with substantial delays attributable to the consultant, and no current project or project completed in the last year experienced substantial delays attributable to the organization/consultant – meets the criteria.

Does not meet the criteria (0 points - eliminated): two or more of the organization/consultant's references indicate that the consultant's project(s) were completed with substantial delays attributable to the consultant, or the proponent has any litigation pending involving decisions made by the proponent -- does not meet the criteria.

### **D. SCORE FOR QUALITY OF WRITTEN MATERIALS**

D. Quality of Written Materials. Evaluators will review the proposal and any writing samples provided to determine relative quality, readability, responsiveness to community input, clarity of recommendations or study conclusions, and quality of final plans and specifications as these criteria apply to various written submissions.

Organization/Consultant may also submit other writing samples, such as news releases, program descriptions, planning studies, handouts, meeting minutes, etc. Materials will be evaluated for clarity of presentation and content that demonstrates understanding of CDBG-funded projects.

***Evaluation Criteria:***

Highly advantageous (5 points): Proposals and writing samples containing few or no analytical, grammatical or typographical errors and which communicate a strong understanding of the elements of a CDBG-funded project – exceeds the criteria.

Advantageous (3 points): Proposals and writing samples that respond to all of the components of the RFP and contain modest analytical, grammatical or typographical errors – meets the criteria.

Does not meet the criteria (0 points – eliminated). Proposals and writing samples that are not clear or well organized, or contain significant analytical, grammatical or typographical errors will be considered.

#### **E. SCORE FOR YEARS OF EXPERIENCE**

E. Years of Experience. This criterion will be used to evaluate the level of experience working on this type of project. Three years of experience is the standard for the principals of the firm and five years is the standard for the person who will head the management team assigned to the project.

##### ***Evaluation Criteria:***

Highly advantageous (5 points): individual consultants or organizations with at least five years of CDBG project experience – exceeds the criteria.

Advantageous (3 points): individual consultants or organizations with at least three years of CDBG project experience will be considered – meets the criteria.

Does not meet the criteria (0 points – eliminated): individual consultants or organizations with less than three years of CDBG experience.



**RECOMMENDATION: Must have a minimum of 3 points in all of the evaluation categories – a 0 in any category results in elimination.**

- \_\_\_\_ Score for A - **Block Grant Management Experience**
  - \_\_\_\_ Score for B - **Quality of Grant Management Skills and Experience**
  - \_\_\_\_ Score for C - **Quality of References**
  - \_\_\_\_ Score for D - **Quality of Written Materials**
  - \_\_\_\_ Score for E - **Years of Experience**
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\_\_\_\_ **Total Score**

**Check one:**

- \_\_\_\_ **Recommend and interview**
- \_\_\_\_ **Do not recommend for an interview**

**Signed by individual(s) completing the evaluation:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Interview. The Town, after reviewing proposals and at its sole discretion, may interview organizations/consultants who meet the minimum and comparative criteria. Each individual or firm/team must receive a ranking of “advantageous” or higher in all the evaluation categories to be eligible for an interview. The interview will be held to:
  - a. determine the direct professional experience of the consultant or organization (up to 5 points)
  - b. explore the specific details of the organization/consultant’s experience and ask questions (5 points)
  - c. determine the allocation of personnel assigned to the project and their contribution to the project (5 points)
  - d. determine the working relationship with Town’s staff and officials, the Town, and any Citizen’s Advisory Committees (10 points)

**Final Recommendation:**

- \_\_\_\_ **Recommend that the Town offer a contract**
- \_\_\_\_ **Do not recommend this organization/consultant**

**Signed:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**G. MISCELLANEOUS ARTICLES**

1. Please contact Susan M. Labrie, Town Administrator, Town of Chesterfield at (413) 296-4771 ext. 1# if you have any questions about the RFP.
2. The Contractor shall be solely responsible for all claims of whatever nature arising out of the rendering of services by the Contractor during the term of this proposal and the Contractor shall indemnify and hold the Town harmless against the same to the extent permitted by law.
3. The selection of the consultant shall be made without regard to race, color, sex, age, religion, political affiliation, or national origin.
4. The Town is an Affirmative Action/Equal Opportunity Employer and it encourages proposals from Section 3 qualified, minority and women-owned business firms.

**CERTIFICATIONS**

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word “person” shall mean natural person, business, corporation, union, committee, club, or other organization, entity, or group of individuals.

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Typed name and title**

\_\_\_\_\_  
**Name of Business**

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**CERTIFICATE OF TAX COMPLIANCE**

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A (b), I,

\_\_\_\_\_, authorized signatory for \_\_\_\_\_  
*Printed Name of Individual* *Name of Consultant/Organization*

I do hereby certify under the pains and penalties of perjury that said contractor has complied with all laws of the Commonwealth of Massachusetts, and the Town of Chesterfield and is current with all local, state, and federal taxes, child support, and other assessments.

**Consultant**

By: \_\_\_\_\_  
**Signature of Authorized Representative**

\_\_\_\_\_  
**Title**

\_\_\_\_\_  
**Date**

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