

Texas Community Development Block Grant Program Administration & Engineering Services Webinar



TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

Understanding RFP and RFQ

RFP

Request for Proposal

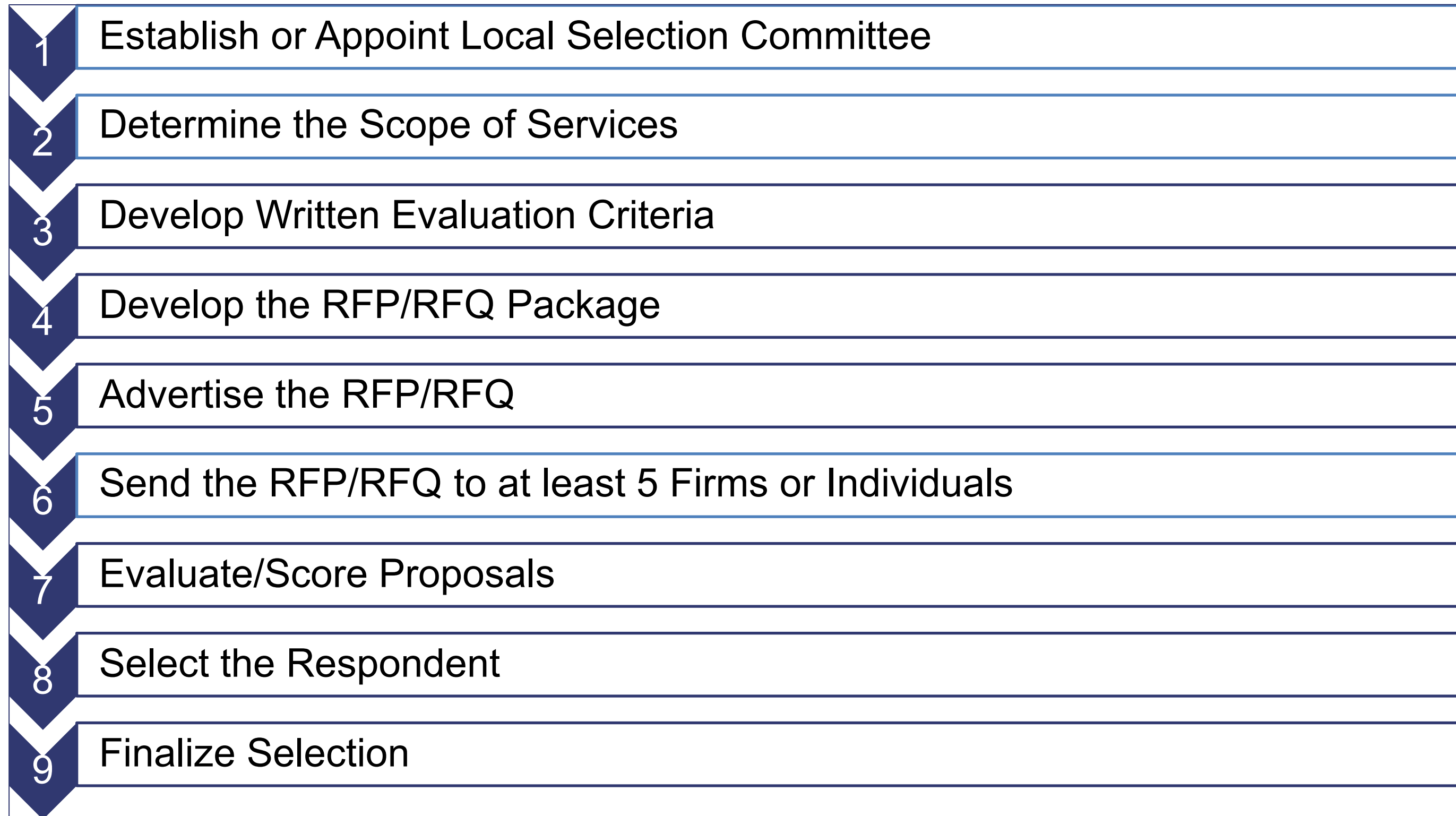
Administration Services

RFQ

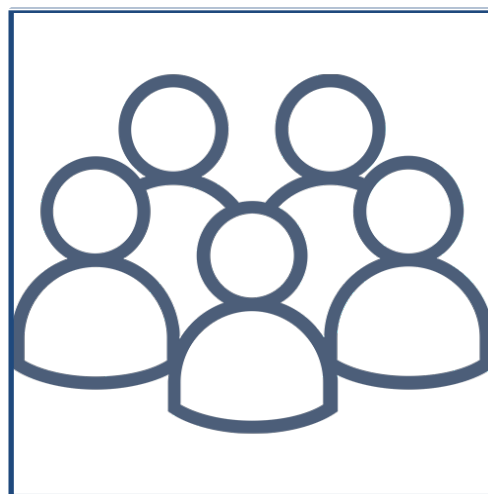
Request for Qualifications

Engineering Services

Step-by-Step Selection Process



Establish or Appoint Local Selection Committee



Minimum 3 members including one local elected official

No real or apparent conflict of interest



Document appointed committee details in procurement file and MSR/TDA-GO

SAMPLE Selection Review Committee Appointment

The following persons have been appointed to:

- Determine the criteria to select professional service providers; and
- Review and rate qualifications from professional service providers.

Name	Title/Office/Position
1.	
2.	
3.	
4.	

Appointed by: _____

Date: _____

Determine the Scope of Services

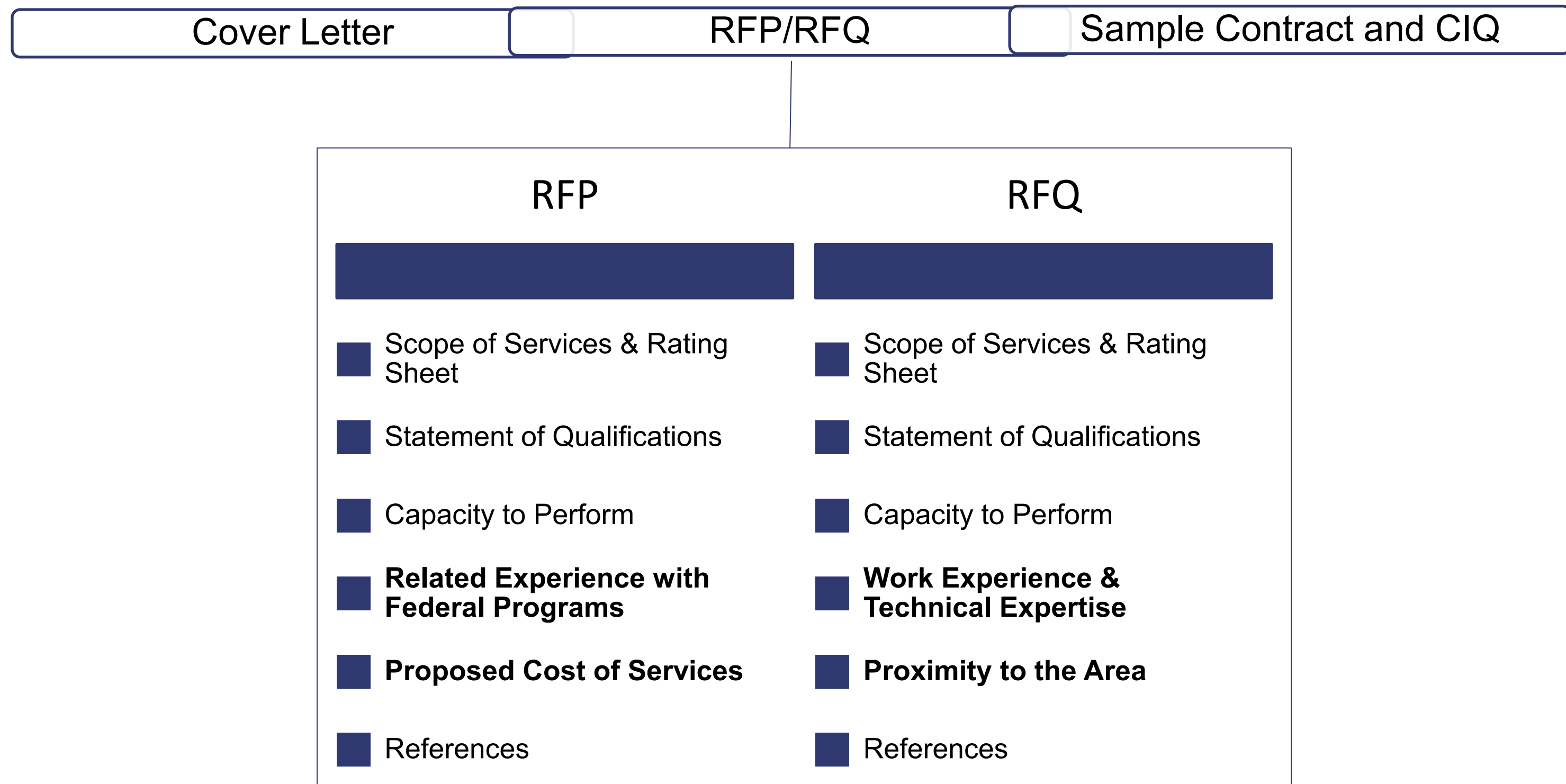
- Define clear scope, deadlines, and goals for TxCDBG administration
- Limit each service contract to one stand-alone TxCDBG grant

Develop Written Evaluation Criteria

- Develop written criteria for evaluating proposals and selecting the contract award
- Include cost as an evaluation factor for administration but exclude it for engineering
- Involve the local governing body in establishing the criteria

Develop the RFP/RFQ Package

- The RFP/RFQ package must contain the following three parts:



Advertise the RFP/RFQ



Advertise the RFP/RFQ in a locally distributed newspaper and retain proof



The proposal deadline must be at least 10 days after the advertisement publication

Send the RFP/RFQ to Minimum 5 Firms or Individuals

Send the RFP/RFQ to Minimum 5 Firms or Individuals by email, fax, and/or return receipt mail



Document the reasons for selection for local files



Document evidence of contacting 5 individuals/ firms

Evaluate/Score Proposals

Evaluate all proposals using respondent's experience, work performance, and capacity to perform

Use prior experience with the respondent and/or contact references to support the evaluation

Apply the established criteria to score each respondent and document the ratings

Reissue the RFQ if the sole respondent is not a fit for the project

Administration

Form A502a

Sample 1 – TxCDBG Grant Administration Rating Sheet

Grant Recipient _____ TxCDBG Application/Grant No. _____
Name of Respondent _____ Date of Rating _____
Evaluator's Name _____

Experience -- Rate the Respondent of the Request For Proposal (RFP) by awarding points up to the maximum listed for each factor. Information necessary to assess the Respondent on these criteria may be gathered either from past experience with the Respondent and/or by contacting past/current clients of the Respondent.

Experience	Max.Pts.	Score
Factors		
1. Related Experience / Background with federally funded projects	10	
2. Related Experience / Background with specific project type, housing rehabilitation, acquisition of property, coordination with regulatory agency, etc)	5	
3. Certified Administrator of TxCDBG Program by TDA	5	
4. References from current/past clients	10	
Subtotal, Experience	30	
Work Performance		
Factors	Max.Pts.	Score
1. Submits requests to client/TDA in a timely manner	5	
2. Responds to client/TDA requests in a timely manner	5	
3. Past client/TDA projects completed on schedule	5	
4. Work product is consistently of high quality with low level of errors	5	
5. Past client/TDA projects have low level of monitoring findings/concerns	5	
6. Manages projects within budgetary constraints	5	
Subtotal, Performance	30	
Capacity to Perform		
Factors	Max.Pts.	Score
1. Qualifications of Professional Administrators / Experience of Staff	5	
2. Present and Projected Workloads	5	
3. Quality of Proposal/Work Plan	5	
4. Demonstrated understanding of scope of the TxCDBG Project	5	
Subtotal, Capacity to Perform	20	
Proposed Cost		
Factors	Max.Pts.	Score
A = Lowest Proposal \$ _____		
B = Bidder's Proposal \$ _____		
A ÷ B X 20 equals Respondent's Score	20	
TOTAL SCORE		
Total Score	100	

Form A502b

Sample 2 – TxCDBG Grant Administration Rating Sheet

Grant Recipient _____ TxCDBG Application/Grant No. _____
Name of Respondent _____ Date of Rating _____
Evaluator's Name _____

Experience -- Rate the Respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Federal Procurement Procedures	5		
2. Environmental Reviews	5		
3. Fair Housing/EEO	5		
4. Financial Management	5		
5. Uniform Act Acquisition/Relocation	5		
6. Project Construction Management	5		
7. Labor Standards Requirements	5		
8. Audit/Contract Close-out	5		
Subtotal, Experience	40		

Work Performance

Factor	Max.Pts.	Score	Comments
1. Submits requests to Client/TDA in a timely manner	5		
2. Responds to Client/TDA requests in a timely manner	5		
3. Past Client/TDA projects completed on schedule	5		
4. Work product is consistently of high quality with low level of errors	5		
5. Past Client/TDA projects have low level of monitoring findings/concerns and Respondent responds to monitoring reports in a timely manner	5		
6. Manages projects within budgetary constraints	5		
Subtotal, Performance	30		

NOTE: Information necessary to assess the Respondent on these criteria should be gathered by contacting past/current clients.

Capacity to Perform

Factor	Max.Pts.	Score	Comments
1. Staffing Level / Experience of Staff	5		
2. Adequacy of Resources	5		
Subtotal, Capacity to Perform	10		

Proposed Cost

Factor	Max.Pts.	Score	Comments
A = Lowest Proposal \$ _____			
B = Bidder's Proposal \$ _____			
A ÷ B X 20 equals Respondent's Score	20		

TOTAL SCORE

Factor	Max.Pts.	Score	Comments
☐ Experience	40		
☐ Work Performance	30		
☐ Capacity to Perform	10		
☐ Proposed Cost	20		

Form A502E

Sample - Engineer/Architect/Surveyor Rating Sheet

Grant Recipient _____ TxCDBG Contract No. _____
Name of Respondent _____ Date of Rating _____
Evaluator's Name _____

Experience -- Rate the respondent for experience in the following areas:

Factor	Max.Pts.	Score	Comments
1. Has previously designed _____ type of projects	20		
2. Has worked on federally funded construction projects	10		
3. Has worked on projects that were located in this general region.	10		
Note: Location for A/E (Architect/Engineer) may be a selection criterion provided its application leaves an appropriate number of qualified firms, given the nature and size of the project, to compete for the contract. 2 CFR 200.319(b)			
4. Extent of experience in project construction management	15		
5. Current Certification of TxCDBG Project Implementation Training	5		
Subtotal, Experience	60		

Work Performance

Factor	Max.Pts.	Score	Comments
1. Past projects completed on schedule	10		
2. Manages projects within budgetary constraints	5		
3. Work product is of high quality	10		
Subtotal, Performance	25		

NOTE: Information necessary to assess the respondent on these criteria should be gathered by contacting past/current clients.

Capacity to Perform

Factor	Max.Pts.	Score	Comments
1. Staff Level / Experience of Staff	5		
2. Adequacy of Resources	5		
3. Professional liability insurance is in force	5		
Subtotal, Capacity to Perform	15		

TOTAL SCORE

Factor	Max.Pts.	Score	Comments
☐ Experience	60		
☐ Work Performance	25		
☐ Capacity to Perform	15		
Total Score	100		

Select the Respondent

Determine the most qualified provider of services.

- Administration: Negotiate with respondents in a competitive price range and retain records of the process
- Engineering: Request a price proposal from the most highly qualified respondent and, if negotiations are unsuccessful, move to the next respondent to seek a fair and reasonable price

Finalize Selection

- Verify the respondent's status in SAM.gov before awarding the contract
- Present selection to the City Council/Commissioner's Court
- Minutes of meeting documenting the award must include:
 - The grant number
 - The name of the contractor/service provider
 - The purpose of the contract/agreement
 - The amount of the awarded contract
- If a respondent not recommended by the Selection Committee is awarded, the meeting minutes must include the justification
- Submit the completed MSR within 30 days of contract execution or grant award, whichever occurs last

Mandatory Documents for Compliance Monitoring

Required Document	Notes
Selection Committee Appointment	Form A501, Form A501E
Newspaper Advertisement	Tear Sheet/ Full-page with Date/ Newspaper Clipping with Publisher's Affidavit
Proof of Solicitation	Screenshot of the email sending the RFP/RFQ Form A503, Form A503E Proof of Certified Mail Delivery or Email Read Receipt
Complete RFP/RFQ packet	Cover Letter RFP/RFQ Sample Contract
Proof of Proposals Received	Copy of All Proposals Received
Proposal Evaluation	RFP: Form A502 RFQ: Form A502E Summary Score Sheet (Form A504, Form A504E)
SAM Verification	Screenshot of Exclusion Search with Verification Date
Minutes of Meeting	Minutes of Local Governing Body Meeting Documenting the Award
Executed Contract	Final Signed Contract Including Conflict of Interest Questionnaire



THANK YOU