



South Billings Urban Renewal Association

Request for Proposals

For Consultant Services

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REQUEST FOR PROPOSALS
For Professional Services to the Board of Directors of the South Billings
Urban Renewal Association

SECTION 1 – GENERAL INFORMATION

1.1 Purpose

The South Billings Urban Renewal Association (SBURA) is soliciting proposals from qualified Consultants to provide consultant and project management services to serve the Board of Directors.

1.2 General Submission Information

The SBURA Board of Directors intends to award a single contract for consultant services. The proposal should address the Consultant's capabilities for performing all aspects of the project development process while presenting specific project information and substantiating the Consultant's methodologies and approach for completing the work requested.

1.3 Questions

Questions regarding this proposal shall be submitted to

Jim Tevlin
Interim Consultant
PO Box 21271
Billings, MT 59104
406-670-5883
Jtev1960@gmail.com

during regular business hours (local time), Monday through Friday.

1.4 Preparation Costs

The Board shall not be responsible for proposal preparation costs, nor for costs including attorney fees associated with any (administrative, judicial or otherwise) challenge to the determination of the highest-ranked Proposer and/or award of contract and/or rejection of proposal. By submitting a proposal each Proposer agrees to be bound in this respect and waives all claims to such costs and fees.

SECTION 2 – RULES GOVERNING COMPETITION

2.1 Examination of Proposals

Proposers should carefully examine the entire RFP, any addenda thereto, and all related materials and data referenced in the RFP. Proposers should become fully aware of the nature of the Work and the conditions likely to be encountered in performing the Work.

2.2 Proposal Acceptance Period

Award of this proposal is anticipated to be announced within thirty (30) calendar days, although all offers must be completed and irrevocable for ninety (90) days following the submission date.

2.3 Confidentiality

The content of all proposals will be kept confidential until the selection of the Contractor is publicly announced. At that time the selected proposal is open for review. After the award of the Contract, all proposals will then become public information.

2.4 Proposal Format

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be placed on:

- Conformance to the RFP instructions
- Responsiveness to the RFP requirements
- Overall completeness and clarity of content

2.5 Signature Requirements

All proposals must be signed. An officer or other agent of a corporate vendor, if authorized to sign Contracts on its behalf; a member of a partnership; the owner of a privately owned vendor; or other agent if properly authorized by a Power of Attorney or equivalent document may sign a proposal. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.

2.6 Proposal Submission

Five (5) copies of the proposal must be received prior to 5:00 PM on July 28, 2023, and plainly marked. Proposals shall be delivered or mailed to:

SBURA Board of Directors
PO Box 21271
Billings, MT 59104

2.7 News Releases

News releases pertaining to the award resulting from the RFPs shall not be made without prior written approval of the SBURA Board of Directors.

2.8 Disposition of Proposals

It is a policy statement that all materials submitted in response to this RFP become public records under Article II, Section 9 of the Montana Constitution and §§ 2-6-102 and 7-1-4144, MCA and may be distributed by written request pursuant to Montana's Constitutional Right to Know or Public Records Acts.

Information provided in response to this RFP will be held in confidence and will not be revealed or discussed with competitors prior to award of Contract by the Board of Directors. However, one copy of each proposal submitted shall be retained for the official files of the Board and will become public record after award of the Contract. Fee or Price schedules submitted, but not reviewed by the Board, do not become a public record and shall only be retained for official files.

Records and materials that are constitutionally protected from disclosure are not subject to the provisions of this section.

The Consultant understands that, if selected, the Board reserves the right to provide its opinion publicly and privately regarding the Consultant's performance.

2.9 Modification/Withdrawal of Proposals

A respondent may withdraw a proposal at any time prior to the final submission date by sending written notification of its withdrawal, signed by an agent authorized to represent the agency. The respondent may thereafter submit a new or modified proposal prior to the final submission date. Modifications offered in any other manner, oral or written, will not be considered. A final proposal cannot be changed or withdrawn after the time designated for receipt, except for modifications requested by the Board after the date of receipt and following oral presentations.

2.10 Oral Change/Interpretation

No oral change or interpretation of any provision contained in this RFP is valid whether issued at a pre-proposal conference or otherwise. Written addenda will be issued when changes, clarifications, or amendments to proposal documents are deemed necessary by the Municipality.

2.11 Late Submissions

PROPOSALS NOT POSTMARKED BY THE DATE AND TIME SPECIFIED IN THE COVER LETTER WILL NOT BE CONSIDERED AND WILL BE RETURNED UNOPENED AFTER RECOMMENDATION OF AWARD.

2.12 Rejection of Proposals

The SBURA Board of Directors reserves the right to reject any or all proposals if determined to be in its best interest.

SECTION 3 – SCOPE OF WORK

3.1 Type of Services

The type of professional services required by this RFP may include, but not necessarily be limited to:

1) District Administration & Project Management

- a. In collaboration with the City of Billings Planning Division, administer and oversee the South Billings Boulevard Urban Renewal District (SBBURD) under the direction of the South Billings Urban Renewal Association Board of Directors and the City of Billings Council.
- b. Provide project management services as it relates to the administration of the SBURD.
- c. Facilitate information exchange and communication services to other City of Billings Departments as well as other community groups such as the Yellowstone County Commissioners, Big Sky Economic Development, School District #2, and the Montana Department of Transportation

2) Reporting to SBURA Board of Directors

- a. Determine, in consultation with the SBURA Board, the form and content of deliverables and periodic reporting requirements.
- b. Determine roles and expectations of SBURA Board members and City staff to ensure contract compliance.
- c. Establish performance measurements, in consultation with the SBURA Board, to ensure contractual obligations are met.
- d. Preparation of and presentation of the Semi-Annual Report as part of regular updates to the City Council.

3) Project Planning & TIF Incentives Administration

- a. In consultation with the City of Billings Finance Director, analysis and updating of the annual Montana Department of Revenue Certified Taxable Values released the first Monday of August.
- b. Ensure that any activity utilizing TIF resources complies with Montana Urban Renewal Law. Specifically, whether or not any activity would be in compliance with and appropriate for funding under the statutory guidelines provided in Montana Code Annotated 7-15-4233 and 7-15-4288.
- c. Updating of the South Billings Tax Increment Finance Incentive form to reflect current conditions and any changes as per the directive of the Board of Director along with presenting the completed form with recommendations to the SBURA Board.

3.2 Scope Detail

The SBURA Board therein, is seeking a consultant to perform certain project management, administrative, and public relations functions. The consultant should be experienced in developing and executing high-level strategic plans and managing large projects utilizing both public and private funding. The consultant should have the resources necessary to conduct all activities associated with this scope of work. The consultant must be able to report to the Board of Directors on project delivery and make recommendations to enhance the strategic vision of the Board. The consultant will meet with the Board on a regular basis to assess changing project and administrative needs and adjust the action plan as determined by the Board. The consultant should understand that the Board will own the rights to all content and materials developed on their behalf and may distribute as determined to be in the best interest of the Board.

SECTION 4 – PROPOSAL AND SUBMISSION REQUIREMENTS

To achieve a uniform review process and obtain the maximum degree of comparability, the proposals shall be organized in the manner specified below. Proposals shall be typed on 8 1/2" X 11" sheet of paper.

The submittal shall include a provision under **Section 4.4.D - Available Resources** for notifying the Board within thirty (30) days of any changes of personnel that are included in this statement and the addition to the Consultant's staff of any personnel who may contribute to the specialties for which the Consultant has been selected. The Board reserves the right to approve all personnel changes.

4.1 Title Page (1 Page)

Show the RFP project being proposed on, the name of your firm, address, telephone number(s), name of contact person, and date.

4.2 Letter of Transmittal (Limited to 1 Page)

- A. Identify the RFP project for which proposal has been prepared.
- B. Briefly state your firm's understanding of the services to be performed and make a positive commitment to provide the services as specified.
- C. Provide the name(s) of the person(s) authorized to make representations for your firm, their titles, address, and telephone numbers.
- D. The letter of each proposal must be signed by a corporate officer or other individual who has the authority to bind the firm. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.

4.3 Table of Contents (1 Page)

Clearly identify the materials by Section and Page Number.

4.4 Proposal Narrative

A. Firm Experience (0-10 Points)

1. Detail the firm's experience in the same or similar areas of expertise, stability, and its adaptability to providing the required services for small task projects.
2. Provide at least three references for which your firm has provided the same or similar services. Include a point of contact, current telephone number, and a brief description of the services provided.
3. Identify your firm's performance on similar projects, especially noting work and task work of this type. Provide a point of contact for all work identified that may be relevant. A current telephone number should also be provided if applicable.

B. Key Project Staff and Subconsultants (0-25 Points)

Identify any and all key project staff, task leaders, and subconsultants, along with their availability, expected to provide services on behalf of the firm. Resumes should be included for each of the individuals and subconsultants referenced, which details their relevant experience. Performance on projects, especially government, should be noted.

C. Available Resources (0-15 Points)

1. Business History: Provide information on size, resources, and business history of the firm.
2. Provide information on personnel resources available to your firm, which indicates that you have access to the services necessary to perform the work in the time available and to the required standard.

D. Proposed Approach (0-30 Points)

Provide detailed information on the firm’s methodology in meeting the scope of work requirements identified in Section 3. Describe an overall approach to include special considerations, which may be envisioned in scoping, completing, and managing development and delivery of any and all plans. Please provide examples of innovative and creative approaches used in the past that have garnered positives results. Provide examples and results of plans including an example of experience in dealing with similar projects with successful results for all projects and examples and results of demonstrated project management skills.

E. Cost to the SBURA Board of Directors (0-20 Points)

The Board seeks to understand all costs associated with the implementation and ongoing costs. Prepare and submit pricing offer and cost sheet, if applicable. If the price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

SECTION 5 – EVALUATION CRITERIA AND SELECTION PROCESS

5.1 Evaluation Criteria

Submittals will be evaluated in accordance with the following criteria:

A. Firm Experience	0-10 Points
B. Key Project Staff and Subconsultants	0-25 Points
C. Available Resources	0-15 Points
D. Proposed Approach	0-30 Points
E. Cost to the Board of Directors	0-20 Points
Maximum Score	100 Points

5.2 Qualitative Rating Factor

Firms will be ranked using the following qualitative rating factors for each RFP criterion:

- 1.0 Outstanding
- 0.8 Excellent
- 0.6 Good
- 0.4 Fair
- 0.2 Poor
- 0.0 Unsatisfactory

The rating factor for each criterion category will be multiplied against the points available to determine the total points for that category.

A committee of individuals representing SBURA and possibly the City of Billings as a community partner will perform evaluations of the proposals. The committee will rank the proposals as submitted.

The SBURA Board reserves the right to award Contract(s) solely on the written proposal. The Board also reserves the right to request oral interviews with the highest-ranked firms (short-list). The purpose of the interviews with the highest-ranking firms is to allow expansion upon the written responses. If interviews are conducted, a maximum of three firms will be short-listed. A second score sheet will be used to score those firms interviewed.

The final selection will be based on the total of all evaluators' scores achieved on the second rating, if needed and applicable. The same categories and point range will be used during the second evaluation as for the first. The highest-ranked Proposer(s), after the second scoring, if performed, may be invited to enter into final negotiations with the Board for the purposes of Contract Award.

SECTION 6 – CONTRACT NEGOTIATION PROCESS

The highest-ranked Proposer(s) may be invited to enter into Contract negotiations with the SBURA Board of Directors. If an agreement cannot be reached with the highest-ranked Proposer, the Board shall notify the Proposer and terminate negotiations. The second highest Proposer may be contacted for negotiations. This process may continue until successful negotiations are achieved. However, the Board reserves the right to terminate negotiations with any Proposer should it be in the Board's best interest. The SBURA reserves the right to reject any and all proposals submitted.