

**ACCEPTING PROPOSALS FOR PROJECT BASED VOUCHERS
MONTANA DEPARTMENT OF COMMERCE
RENTAL ASSISTANCE BUREAU**

SCHEDULE OF EVENTS

EVENT	DATE
Proposal Issued	09/30/2024
Deadline for Receipt of Written Questions	10/10/2024
Deadline for Posting Responses to Written Questions to the State's Website	10/18/2024
Proposal Due Date	11/01/2024
Intended date for contract award*	11/15/2024

*The dates above identified by an asterisk are included for planning purposes. These dates are subject to change.

OVERVIEW AND REGULATORY FRAMEWORK

The State of Montana, Department of Commerce, Housing Division (the “Department”), works with community partners across the state to ensure Montana families have access to safe and affordable homes. The Department’s Rental Assistance Bureau, Montana’s statewide Public Housing Authority (PHA), is charged with the administration of numerous federally funded U.S. Department of Housing and Urban Development (HUD) rental assistance programs.

The Department is issuing this proposal to seek responses from qualified property owners and/or developers for Project Based Vouchers (PBV) available under the Montana Department of Commerce 2025 PHA Administration Plan, [Chapter 17-II.B. Owner Proposal Selection Procedures](#) [24 CFR 983.51(b2)].

Per HUD regulations, the PHA must select PBV proposals in accordance with the selection procedures in the PHA Administrative Plan, by either of the following two methods:

- PHA request for PBV Proposals. The PHA may solicit proposals by using a request for proposals to select proposals on a competitive basis in response to the PHA request. The PHA may not limit proposals to a single site or impose restrictions that explicitly or practically preclude owner submission of proposals for PBV housing on different sites.

- The PHA may select proposals that were previously selected based on a competition. This may include selection of a proposal for housing assisted under a federal, state, or local government housing assistance program that was subject to a competition in accordance with the requirements of the applicable program, community development program, or supportive services program that requires competitive selection of proposals (e.g., HOME, and units for which competitively awarded LIHTCs have been provided), where the proposal has been selected in accordance with such program's competitive selection requirements within three years of the PBV proposal selection date, and the earlier competitive selection proposal did not involve any consideration that the project would receive PBV assistance. The PHA need not conduct another competition.

The Department is releasing this proposal to qualified property owners and/or developers of projects that were previously selected based on a competition. Please refer to PHA Administrative Plan, Chapter 17-II.B: “Commerce will only select a proposal that was competitively awarded through a previous competition for federal, state, or local government housing assistance, community development or supportive services program. This includes projects that were competitively awarded Low Income Housing Tax Credits (LIHTC).” PBV proposals will be accepted for existing housing unit(s) and/or rehabilitation or new construction projects. Proposals are due to the Department no later than 11:59 p.m. MST on Thursday, October 31, 2024. Late proposals will not be accepted. The Department will award up to fifty (50) Project Based Vouchers for one or multiple eligible project(s), for the purpose of creating and/or expanding affordable housing to Very Low- and Extremely Low-Income families. *Extremely Low Income* is defined as household income at 30% Area Median Income (AMI) or less; *Very Low-Income* is defined as household income at 50% AMI or less.

SCOPE OF SERVICES

To enable the Department to determine the capabilities of an Offeror to perform the services specified in the proposal, the Offeror shall respond to the following regarding its ability to meet the Department's requirements.

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

SELECTION CRITERIA

- Proposals will only be accepted for Project-Based Housing Choice Vouchers (HCV) serving Very Low- and Extremely Low-Income families.
- The Department will enter into an Agreement to enter into a Housing Assistance Payment (AHAP) contract and a Housing Assistance Payment (HAP) contract with the property owner(s) for all sites selected and approved for PBV assistance. The Department's HAP contract(s) with the selected property owner(s) will include the designated rental units for a term of up to twenty (20) years in accordance with 24 CFR 983.205 Term of HAP contract, subject to funding availability. Housing assistance subsidies will be provided while eligible families occupy the rental housing units, and the units must meet all applicable program standards, during the HAP contract term and subject to funding availability.
- The Department will work with the selected project(s) to establish waiting list procedures, including any updates needed to the PHA Administrative Plan. The current PHA Administrative Plan outlines the PBV property owner's responsibility for screening and selection of families referred by the Department from the Department's waiting list to occupy the owner's unit. At least seventy-five percent (75%) of the families approved for tenancy shall be families whose annual income does not exceed thirty percent (30%) of AMI for the project's area as determined by HUD and as adjusted by family size.
- The Department's published Voucher Payment Standards will determine the allowable Housing Assistance Payment subsidy, based on appropriate unit size for the participant and the participant's household composition.
- The Department may, at its discretion, provide vacancy loss payments in certain circumstances to property owner(s) in their HAP contract(s), consistent with the PHA Administrative Plan, Chapter 17-V.F and 24 CFR 983.352(b).

Prohibition of assistance for ineligible units (24 CFR 983.52)

The following types of housing units and/or developments are not eligible for PBV assistance (Chapter 17-II.D.Prohibition of Assistance for Certain Units):

- shared housing units;
- units on the grounds of a penal reformatory, medical, mental, or similar public or private institution;
- nursing homes or facilities providing continuous psychiatric, medical, nursing services, board and care, or intermediate care (except that assistance may be provided in assisted living facilities);
- units that are owned or controlled by an educational institution or its affiliate and are designated for occupancy by students;
- manufactured homes;
- transitional housing;
- owner-occupied housing units (a member of a cooperative who owns shares in the project assistance under the PBV program is not considered an owner for purposes of participation in the PBV program);
- units occupied by an ineligible family at the time of proposed submission or prior to execution of the HAP contract
- units occupied by an ineligible family at the time of proposal submission or prior to execution of the HAP contract;
- units for which construction or rehabilitation has started after the proposed submission and prior to the execution of an Agreement to enter into a Housing Assistance Payment contract (AHAP);

Prohibition of assistance for units in subsidized housing (24 CFR 983.53)

Subsidized housing unit types determined ineligible in accordance with HUD regulations include, but are not limited to:

- public housing units;
- units subsidized with any other form of Section 8 assistance;
- units subsidized with any governmental subsidy that covers all or part of the operating costs of the housing;

- units subsidized with Section 236 rental assistance payments (except that a PHA may attach assistance to a unit subsidized with Section 236 interest reduction payments);
- units subsidized with Section 202 project for non-elderly with disabilities;
- units subsidized with Section 811 project-based supportive housing for persons with disabilities;
- units subsidized with Section 202 supportive housing for the elderly;
- units subsidized with Section 101 rent supplement project;
- units subsidized with any form of tenant-based rental assistance;
- units with any other duplicative federal, state, or local housing subsidy, as determined by HUD or the PHA in accordance with HUD requirements.
- units subsidized with rental assistance payments under Section 521 of the Housing Act of 1949, [42 U.S.C. 1490a](#) (a Rural Housing Service Program). However, the PHA may attach assistance for a unit subsidized with Section 515 interest reduction payments ([42 U.S.C. 1485](#)).

Cap on number of PBV units in each project (24 CFR 983.54)

In general, the PHA may not select a proposal to provide PBV assistance for units in a project or enter into an AHAP or HAP contract to provide PBV assistance for units in a project, if the total number of dwelling units in the project that will receive PBV assistance during the during of the PBV HAP contract is more than the greater of 25 units or 25 percent of the number of dwelling units (assisted or unassisted) in the project.

Exceptions to 25 Percent per Project Cap [24 CFR 983.54(c)]

As noted in Chapter 17.II.F. of the PHA Administrative Plan, exception to the per project cap include:

- The units are exclusively for elderly families;
- The units are for households eligible for supportive services available to all families receiving PBV assistance in the project (see *Supportive Services* below for more detail);
 - If the project is located in a census tract with a poverty rate of 20 percent or less, as determined by the most recent American Community Survey Five-Year estimates, the project cap is the greater of 25 units or 40 percent (instead of 25 percent) of the units in the project.

Note that the Housing Opportunity Through Modernization Act of 2016 (HOTMA) eliminated the project cap exemption for projects that serve disabled families and modified the exception for supportive services.

- *Supportive Services.* PHAs must include in the PHA Administrative Plan the type of services offered to families for a Project to qualify for the exception and the extent to which such services will be provided. As of April 18, 2017, the Project must make supportive services available to all families receiving PBV assistance in the Project, but the family does not actually have to accept and receive supportive services for the exception to apply to the unit, although the family must be eligible to receive the supportive services. It is not necessary that the services be provided at or by the Project but must be reasonably available to families receiving PBV assistance at the Project and designed to help families in the Project achieve self-sufficiency or live in the community as independently as possible. A PHA may not require participation in the supportive service as a condition of living in the excepted unit, although such services may be offered.

Existing and Rehabilitated Housing Site and Neighborhood Standards [24 CFR 983.55(d)]

- Be adequate in size, exposure, and contour to accommodate the number and type of units proposed, and adequate utilities and streets available to service the site. (The existence of a private disposal system and private sanitary water supply for the site, approved in accordance with law, may be considered adequate utilities);
- Promote a greater choice of housing opportunities and avoid undue concentration of assisted persons in areas containing a high proportion of low-income persons;
- Be accessible to social, recreational, educational, commercial, and health facilities and services and other municipal facilities and services equivalent to those found in neighborhoods consisting largely of unassisted similar units; and
- Be located so that travel time and cost via public transportation or private automobile from the neighborhood to places of employment is not excessive.

New Construction Site and Neighborhood Standards [24 CFR 983.57(e)]

- The site must be adequate in size, exposure, and contour to accommodate the number and type of units proposed;
- The site must have adequate utilities and streets available to service the site;
- The site must not be located in an area of minority concentration unless the PHA determines

that sufficient, comparable opportunities exist for housing for minority families in the income range to be served by the proposed project outside areas of minority concentration or that the project is necessary to meet overriding housing needs that cannot be met in that housing market area. See 24 CFR 983.55(e)(3) for additional information;

- The site must not be located in a racially mixed area if the project will cause a significant increase in the proportion of minority to non-minority residents in the area;
- The site must promote a greater choice of housing opportunities and avoid undue concentration of assisted persons in areas containing a high proportion of low-income persons;
- The neighborhood must not be one that is seriously detrimental to family life or in which substandard dwellings or other undesirable conditions predominate;
- The housing must be accessible to social, recreational, educational, commercial, and health facilities and services and other municipal facilities and services equivalent to those found in neighborhoods consisting largely of unassisted similar units; and
- Except for housing designed for elderly persons, the housing must be located so that travel time and cost via public transportation or private automobile from the neighborhood to places of employment is not excessive.

Environmental Reviews (24 CFR 983.56)

HUD regulations at 24 CFR parts 50 and 58 apply to activities under the PBV program, except “for projects or proposals that were selected in accordance with the site selection standards at 983.55 in effect on or after June 6, 2024, no environmental review is required to be undertaken before entering into a HAP contract for existing housing, except to the extent a Federal environmental review is required by law or regulation relating to funding other than PBV housing assistance payments. The PHA may not enter into an AHAP or HAP contract until it has complied with all applicable environmental review regulations. Please refer to the PHA Administrative Plan, Chapter 17-II.H. for additional information.

Housing Quality Standards (24 CFR 983.101)

Specific housing quality standards apply to the PBV program:

- *HQS applicability.* As defined in [§ 983.3](#), HQS refers to the minimum quality standards developed by HUD in accordance with [24 CFR 5.703](#) of this title for housing assisted under the PBV program, including any variations approved by HUD for the PHA under [24 CFR](#)

[5.705\(a\)\(3\)](#). Note that HUD is shifting to the NSPIRE inspection framework with implementation deadline no later than October 1, 2025.

- *Requirements for special housing types.* For special housing types assisted under the PBV program, HQS applies to the PBV program except as specified in [24 CFR part 982, subpart M](#). Provisions contained within [24 CFR part 982](#) that are inapplicable to the PBV program pursuant to [§ 983.2](#) are also inapplicable to special housing types under the PBV program.
- *Lead-based paint requirements.* The Lead-based Paint Poisoning Prevention Act ([42 U.S.C. 4821-4846](#)), the Residential Lead-based Paint Hazard Reduction Act of 1992 ([42 U.S.C. 4851-4856](#)), and implementing regulations at [24 CFR part 35, subparts A, B, H, and R](#), apply to the PBV program.
- *HQS enforcement.* [Parts 982](#) and [983 of this chapter](#) do not create any right of the family or any party, other than HUD or the PHA, to require enforcement of the HQS requirements or to assert any claim against HUD or the PHA for damages, injunction, or other relief for alleged failure to enforce the HQS.
- *Additional PHA quality and design requirements.* This section establishes the minimum federal housing quality standards for PBV housing. However, the PHA may elect to establish additional requirements for quality, architecture, or design of PBV housing.

Housing Accessible for Persons with Disabilities (24 CFR part 8)

The PBV housing must comply with program accessibility requirements of Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794) and implementing regulations at 24 CFR part 8.

Labor Standards [24 CFR 983.153(c)]

If an Agreement covers the development of nine or more contract units (whether or not completed in stages), the owner and the owner's contractors and subcontractors must pay Davis-Bacon wages to laborers and mechanics employed in the development of housing. The HUD-prescribed form of the Agreement will include the labor standards clauses required by HUD, such as those involving Davis-Bacon wage rates.

The owner, contractors, and subcontractors must also comply with the Contract Work Hours and Safety Standards Act, Department of Labor regulations in 29 CFR part 5, and other applicable federal labor relations laws and regulations. The PHA must monitor compliance with labor standards.

Resources

- 2025 PHA Administrative Plan is available on our website:
<https://commerce.mt.gov/Housing/Rental-Assistance/Admin-Plan>
- 2024 Voucher Payment Standards are available on our website:
<https://commerce.mt.gov/Housing/Rental-Assistance/Housing-Choice-Voucher-Program>
- Utility Allowance schedules are available on our website:
<https://commerce.mt.gov/Housing/Rental-Assistance/Utility-Allowances>
- PIH Notice 2017-21 Implementation Guidance: Housing Opportunity Through Modernization Act of 2016 (HOTMA) – Housing Choice Voucher (HCV) and Project-Based Voucher (PBV) Provisions.
- PIH Notice 2017-20 Housing Opportunity Through Modernization Act of 2016 (HOTMA) – Housing Quality Standards (HQS) Implementation Guidance.

OFFEROR QUALIFICATIONS

To enable the Department to determine the capabilities of an Offeror to perform the services specified in this proposal, the Offeror shall respond to the following regarding its ability to meet the Department's requirements.

NOTE: Each item must be thoroughly addressed. Offerors making exceptions to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

References

Offeror shall provide a minimum of two references that are currently using or have previously utilized similar services like those in this proposal. The references may include but are not limited to state governments, Public Housing Authorities, non-governmental organizations, or universities for whom the Offeror, preferably within the last five years, has contracted successfully.

At a minimum, the Offeror shall provide the company name, location where the services were provided, contact person(s), contact telephone number, e-mail address, and a complete description of the services provided, and dates of service. These references may be contacted to verify Offeror's ability to perform the contract. The Department reserves the right to use any information or additional references deemed necessary to establish the ability of the Offeror to fulfil the contract. Negative references may be grounds for proposal disqualification.

Company Profile and Experience

Offeror shall provide documentation establishing the individual or company submitting the proposal has the qualifications and experience to provide the services specified in this proposal, including, at a minimum:

- a detailed description of any similar past projects, including the service type and dates the services were provided;
- the client for whom the services were provided; and
- a general description of the firm including its primary source of business, organizational structure and size, number of employees, years of experience performing services similar to those described within this proposal.

Training and Certifications

Copies of related training and/or certifications must be provided for all key personnel who will be performing any aspects of the contract. Examples of applicable trainings may include HUD Certified Occupancy Specialist, Housing Quality Standard Training Certificate, evidence of state of Montana property management license, etc.

Offeror Financial Stability

Offeror shall demonstrate sound fiscal health and financial stability by providing financial statements, preferably audited, for the two consecutive years immediately preceding the issuance of this proposal. The audited financial statements may be for the general partner / parent company, in the event the property ownership entity (LLC, LP etc.) has not been established yet.

Equal Pay for Montana Women

Executive Order No. 12-2016 promoting equal pay for Montana women directs the Department of Administration to include incentives in the proposal process for contractors who engage in best practices to promote wage transparency. These best practices include the following:

- (a) posting salary ranges in employment listings;
- (b) certifying that the contractor will not ask about wage history in employee interviews; and
- (c) certifying that the contractor will not retaliate or discriminate against employees who discuss or disclose their wages in the workplace.

No, I do not agree.

Company Name (Clearly Printed): _____

Authorized Signature: _____

Date: _____

Statement of Compliance with Equal Pay for Montana Women

Offeror indicating it will comply with Executive Order No. 12-2016 will receive 5% of the total points available. Offerors who do not comply will not receive the available points. Offerors are required to sign and upload a PDF copy of this certification with their proposal to certify compliance.

Yes, I agree and will comply with the best practices to promote wage transparency outlined in Executive Order No. 12-2016.

Company Name (Clearly Printed): _____

Authorized Signature: _____

Date: _____

Verification of Nondiscrimination Against Firearms Entities/Trade Associations

Nondiscrimination Against Firearms Entities/Trade Associations. Contractor shall not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association, and Contractor shall not discriminate during the term of the contract against a firearm entity or firearm trade association. This section shall be construed in accordance with HB 356, Ch. 193, Mont. L. 2023.

BASIS OF EVALUATION

Review Panel

Department's Rental Assistance Programs Manager will appoint a PBV Selection Panel to review, evaluate, rank, and select Offeror(s) according to the criteria described herein. This panel will, at a minimum, consist of the Rental Assistance Programs Manager and one supervisor from within the Rental Assistance Bureau.

Department will review all Offeror proposals. Before selecting award(s) for PBV units, Department will determine that each proposal is in compliance with Department's written selection criteria and procedures and in conformity with HUD program regulations and requirements. This includes but is not limited to the following items:

- Evidence of site control;
- Existing housing units must, at the time of Department's selection, substantially comply with Housing Quality Standards or any subsequent standard promulgated by HUD;
- Certification that the owner and other project principles are not on the U.S. General Services Administration list of parties excluded from Federal procurement and non-procurement programs;
- The PBV Proposal and Projects must meet all applicable federal regulations and eligibility requirements, including but not limited to:
 - 24 CFR part 983.4 (Cross-reference to other Federal requirements);
 - 24 CFR part 983.7 (Uniform Relocation Act);
 - 24 CFR part 983.8 (Equal Opportunity requirements);
 - 24 CFR part 983.9 (Special housing types);
 - 24 CFR part 983.11 (Prohibition of excess public assistance);
 - 24 CFR part 983.52 (Prohibition of assistance for ineligible units);
 - 24 CFR part 983.53 (Prohibition of assistance for units in subsidized housing);
 - 24 CFR part 983.54 (Cap on number of PBV units in each project);
 - 24 CFR part 983.55 (Site selection standards);
 - 24 CFR part 983.56 (Environmental review);
 - 24 CFR part 983.58 (PHA determination prior to selection);
 - 24 CFR part 983.59 (Units excluded from program cap and project cap)

- 24 CFR part 983.103 (No construction has begun, as evidenced by Department's inspection)

If a project does not meet the requirements indicated above, it will be designated non-responsive. A notice mailed to the applicant will identify the disqualifying factor. Proposals that meet the requirements will be evaluated and ranked by the Department panel. A Department ranking list will be prepared according to the points awarded to each proposal. Department may, at its discretion, select none, one, or more than one of the proposals submitted.

Department reserves the right to reject any or all proposals, to waive any informality in the proposal process, or to terminate the proposal request process at any time, if deemed by Department to be in its best interests. Department reserves the right to reject and not consider any proposal that does not meet the requirements of this proposal request, including but not necessarily limited to incomplete proposals and/or proposals offering alternate or non-requested services. Department reserves the right to award fewer than the number of units requested, if the requester agrees to accept a lower number of PBV units. Department shall have no obligation to compensate an applicant for costs incurred in responding to this proposal request.

Other Requirements

Before executing an Agreement with any selected owner, Department will:

- Establish rents in accordance with 24 CFR part 983.301 and 24 CFR part 983.302. The amount of the rent to owner is determined in accordance with HUD regulations.
 - Except for certain tax credit units (discussed below), the rent to owner must not exceed the lowest of the following amounts:
 - An amount determined by the PHA, not to exceed 110 percent of the applicable fair market rent (or any HUD-approved exception payment standard) for the unit bedroom size minus any utility allowance;
 - The reasonable rent; or
 - The rent requested by the owner.

The total rent to the owner for PBV assisted units consists of the tenant rent (the portion of the rent to owner paid by the family) and the rental assistance paid by Department in accordance with the contract with the owner. The Department determines the tenant rent in accordance with HUD requirements.

- Obtain subsidy-layering contract rent reviews from HUD or designee, if applicable. See 24 CFR 983.58 PHA determination prior to selection for details on analysis of units, budget and impact.
- Submit a certification to the HUD field office stating that the unit or units were selected in accordance with the Department’s approved unit selection policy.

Offeror Proposals

Proposals will be reviewed, ranked and be subject to the selection criteria described above. The following procedures will be followed by Department in accepting and screening owner proposals submitted for the PBV program.

Offeror Submission

All submissions must be received by Department via email to the State of Montana Secure File Transfer Service (“FTS”) no later than 11:59 p.m. Mountain Daylight Time on the Proposal Due Date of Thursday, October 31, 2024.

Instructions for how to access File Transfer Service, including how to create an account, log-in and submit documents, is available at <https://transfer.mt.gov/Home/Instructions>. The Proposal must be submitted via FTS to Department’s Operations Manager at Joseph.DeFilippis@mt.gov.

The submissions must be received in a readable electronic PDF format, with a subject line of “Project Based Vouchers”. Submissions must be signed by an individual who is authorized on behalf of the Offeror to sign and submit such submission and will also include the authorized individual's direct phone number.

Public Information/Trade Secrets

Subject to exceptions provided by Montana law, all information received in response to this proposal, including copyrighted material, is public information. Before awarding a contract, Department shall provide a notice of intent to award a contract and allow for seven days of written public comment regarding the proposed award. Before releasing the proposals and other information received from Offerors, the procurement officer shall evaluate whether the public disclosure must be limited as required by Montana Code Annotated §§ 18-4-303 and 18-4-304. The exceptions to this requirement are:

- (1) bona fide trade secrets meeting the requirements of the Uniform Trade Secrets Act, Title 30, chapter 14, part 4, MCA, that have been properly marked, separated, and documented;

- (2) matters involving individual safety as determined by the State; and
- (3) other constitutional protections (collectively, "Confidential Information"). See Montana Code Annotated § 18-4-304.

Procurement Officer Review of Proposals

Upon opening the Proposals in response to this RFP, the procurement officer will review the Proposals for information that meets the exceptions referenced above, providing the following conditions have been met:

- a. Confidential Information (including any provided in electronic media) is clearly marked and separated from the rest of the Proposal. The Proposal must be submitted both in an unredacted form (with all Confidential Information visible) and a redacted form (with all Confidential Information redacted). The unredacted and redacted versions of the Proposal must be clearly marked as such.
- b. The Proposal does not contain confidential material in the cost or price section.
- c. An affidavit from the Offeror's legal counsel attesting to and explaining the validity of the Confidential Information and/or trade secret claim as set out in Title 30, chapter 14, part 4, MCA, is attached to each Proposal containing trade secrets. Counsel must use the State of Montana "Affidavit for Trade Secret Confidentiality" form (Exhibit E) in requesting the trade secret claim. This affidavit form is also available on the [State's website](#) or by calling (406) 444-2575.
- d. Information separated out under this process will be available for review only by the procurement officer, the evaluator/evaluation committee members, and limited other designees. Offerors shall pay all of its legal costs and related fees and expenses associated with defending a claim for confidentiality should another party submit a "right to know" (public records) request.

Non-responsive or Non-compliant Proposals

If Department determines that a proposal is non-responsive or non-compliant with this proposal request, written selection criteria and procedures, or HUD program regulations, the proposal will be returned to the applicant with its deficiencies described. Department will give the applicant ten (10) calendar days to correct all deficiencies.

The Offeror's proposal will be considered for the program if the missing information is submitted within this time period.

Department reserves the right to cancel this proposal request for any reason or to reject proposals at
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any time for misinformation, errors, or omissions of any kind, regardless of the stage in the process that has been achieved.

Proposal Content

Submitted proposals must include the following information. The Department will only consider completed applications.

1. Cover letter signed and submitted by the principal party authorized to contract on the organization's behalf. The cover letter must include the following information:
 - Name of organization;
 - Mailing address;
 - Telephone numbers and e-mail addresses;
 - Principal contact person;
 - Executive Officer;
 - DBE/MBE/WBE designation, if applicable;
 - Number of years in business;
 - Number of years of ownership of the development (existing or rehabilitation housing);
2. Copies of most recent two (2) years single audit, audited 990's or financial statements of the organization.
3. Written project proposal for PBV assistance must provide information on the following topics:
 - Owner name;
 - Number of buildings;
 - Total number and size of units;
 - Number of PBV units requested and size of units;
 - Quality and location of units;
 - Other forms of financial or supportive service assistance received;
 - Requested contract term;

 - Handicapped accessibility features;
 - Owner experience with rental housing including the housing choice voucher program;
 - Unit and neighborhood amenities;

- Intended resident population, including target AMI and any special needs;
- Tenant selection criteria and plan (required for existing or rehabilitation units);
- Rent and occupancy status;
- Affordability restrictions;
- Need for PBV assistance;
- Management and maintenance information; and
- Description of supportive services, including but not limited to:
 - Outreach;
 - Case management, counseling;
 - Health care, psychiatric and mental health care, substance abuse treatment;
 - Life skills, parenting skills;
 - Childcare, transportation, housing search assistance, budgeting;
 - Employment assistance, job training/placement; and
 - Education, vocational opportunities.

Offeror must provide a written response to the following four (4) statements:

1. Offeror has ***demonstrated knowledge of and agrees to comply with*** all applicable Federal Rental Assistance program regulations, including but not limited to:
 - a. 24 CFR part 5 (General U.S. Department of Housing and Urban Development (HUD) Program Requirements);
 - b. 24 CFR part 8 (Nondiscrimination Based on Handicap in Federal Programs);
 - c. 24 CFR part 35 [subparts A, B, H, and R](#), apply to the PBV program (Lead Based Paint Activities);
 - d. 24 CFR part 982 (Section 8 Tenant-Based Assistance: Housing Choice Voucher Program);
Note: See 24 CFR 983.1 for when PBV rule part 983 applies, versus 983.2 for when tenant-based voucher rule part 982 applies.
 - e. 24 CFR part 983 (Project-Based Voucher Program);
 - f. 24 CFR part 985 (Section Eight Management Assessment Program);
 - g. 24 CFR part 5, subpart L (Protection for Victims of Domestic Violence, Dating Violence, Sexual Assault, or Stalking).

2. The Offeror has ***demonstrated knowledge of and agrees to comply with*** applicable federal

laws and statutes, including but not limited to:

- a. Title VI of the Civil Rights Act of 1964;
 - b. Title VII of the Civil Rights Act of 1968, as amended;
 - c. Executive Order 11063 and the Montana Human Rights Act prohibiting discrimination against program participants based on race, creed, color, national origin, sex, age, marital status, religion, familial status, and physical or mental disability.
3. Offeror **agrees to comply with** all applicable local, state, and federal laws, regulations, ordinances, and resolutions, as now in effect or as may be amended, and all administrative directives and procedures that may be established or amended by the Department for the Programs, including the most current version of the HUD Program Guidelines, additional federal regulations as published in the Federal Register, program procedures as outlined in HUD handbooks, HUD memos and HUD Notices, and other guidance on these program requirements issued by the Department.
4. The Offeror **agrees to comply with** the Department's PHA Annual Plan, Administrative Plan, Equal Opportunity Housing Plan, Administrative Policy Memorandums, and Electronic Data Transfer Protocol, which must be used to upload all applicant and client information into the HAPPY Housing Pro software system for operation of the Programs or subsequent software for the Programs.

EVALUATION GUIDE

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

- PHA Selection of Proposals Subject to a Previous Competition under a Federal, State, or Local Housing Assistance Program
- The owner or any principal or interested party is not debarred, suspended, or otherwise excluded under 2 CFR part 2424 or listed on the US General Services Administration list of parties excluded from federal procurement or non-procurement programs.
- Proposals will be reviewed on a first-come first-served basis. Commerce will evaluate each proposal on its merits using the following factors:
 1. Extent to which the project furthers Commerce goal of deconcentrating poverty and expanding housing and economic opportunities; and

2. Extent to which the proposal complements other local activities such as the redevelopment of a public housing site under the HOPE VI program, the HOME program, CDBG activities, other development activities in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community.
- Units must be inspected by a Housing Quality Standards (HQS) certified inspector before scoring can occur. If an HQS inspection has been done within the last 12 months that inspection report can be used to satisfy this requirement.
 - Adherence to all Federal, State, Local Regulations/Laws/Rules, and Department’s PHA Annual/Administrative Plans.

Department’s Evaluation Panel will review and score each proposal based on the following criteria:

Scoring Criteria	Max Points Available
<p>Written Project Proposal for PBV Assistance</p> <ul style="list-style-type: none"> • Geographic location of where the project-based vouchers would be available ensuring that the distribution of project-based vouchers is equitable throughout the state (15 points) • Extent to which the project furthers Commerce goal of deconcentrating poverty and expanding housing and economic opportunities (15 points) • Extent to which the proposal complements other local activities such as the redevelopment of a public housing site under the HOPE VI program, the HOME program, CDBG activities, other development activities in a HUD-designated Enterprise Zone, Economic Community, or Renewal Community (15 points) • Target Population, including intended resident population, target AMIs, special needs, Tenant selection criteria and plan, Description of supportive services (15 points) • Need for PBV assistance, including Other forms of financial or supportive service assistance received (15 points) 	75
<p>Offeror Acknowledgement / Agreement to Comply with all Federal, State, Local Regulations/Laws/Rules, and Department’s PHA Annual/Administrative Plans</p>	25
Total	100