



## MONTANA DEPARTMENT OF ADMINISTRATION

### Director's Office

Greg Gianforte, Governor  
Misty Ann Giles, Director

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## NOTICE OF INTENT TO AWARD

Solicitation Title/Event Name:

Solicitation Number:

Solicitation Close Date:

Notice of Intent to Award Post Date:

Issuing Contracts Officer contact information:

The State intends to award a contract to the apparent successful offeror(s) of the above-mentioned solicitation. The Notice of Intent to Award shall not be considered a binding commitment by the state.

Under the Montana Procurement Act, the State has made the relevant scoring matrix/bid tab for the above-mentioned solicitation available for public inspection. Comments from the public regarding the proposed award must be submitted to the Contracts Officer listed above within this 7-day notice period.

### Apparent Successful Offeror(s)

### Unsuccessful Offeror(s)

**COM-RFP-2025-0057AB**  
**Fair Market Rent Reevaluation**

**SCORE SUMMARY WORKSHEET**

Category	Possible Points	Applied Survey Research	Econometrica, Inc.	ICF INCORPORATED LLC	Washington State University
<b>Provision of Services</b>					
Complete contact information provided	Pass/Fail	P	P	P	P
Methodology Plan	10	2	9	10	8
Work Plan	10	2	8	10	6
Scope of Work Question Responses	10	2	7	10	8
Timeline of Work and Deliverables	10	1	10	10	7
<b>Offeror Qualifications</b>					
Years in Business	5	4	5	5	5
Relevant Experience	10	5	9	10	9
Relevant Past Projects	10	5	9	10	9
Resumes of Key Personnel	10	5	9	10	9
Service Organization's Internal Control Assessment	Pass/Fail	P	P	P	P
Internal Control Assessment	Pass/Fail	P	P	P	P
<b>Technical Score</b>	<b>75</b>	<b>26</b>	<b>66</b>	<b>75</b>	<b>61</b>
<b>Cost Proposal</b>					
Cost Proposal	20	20	15	5	5
<b>Eqaul Pay for Montana Women</b>					
Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points	5		0		
<b>Highest Scoring Offeror's Only</b>					
Reference # 1			P		
Reference # 2			P		
Financial Stability					

**COM-RFP-2025-0057AB**

**Fair Market Rent Reevaluation**

**Individual Scoring Matrix**

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of 95 points. The Ability to Meet Provision of Services, Offeror Qualifications and Experience, and Resumes of the proposal will be evaluated based on the following Scoring Guide. The Cost Proposal will be evaluated based on the formula set forth below.

<b>Offeror (Company) Name:</b> Applied Survey Research			<b>Total Points Awarded:</b> 26
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
<b>Provision of Services</b>			
Complete contact information provided	Pass/Fail	P	
Methodology Plan	10	2	There was really no information provided, one paragraph simply stating they will do the work, but no description. The official submission says TBD but does not state on or before January of 25, and no recognition of Montana challenges.
Work Plan	10	2	The work plan was a simple summary, with no details and very general. This response seemed boilerplate, but stated they will get the work done by deadline.
Scope of Work Question Responses	10	2	Very minimal response, with no recognition of technical challenges, use the words hopefully a couple of times during planning process. This response had two main ways of relationships, but no details on how they will maintain those relationships.
Timeline of Work and Deliverables	10	1	This was a minimal response, said they will get the work done by January 3, 2025, but no details. This does not provide any clear deadlines or work product deliverables identified.
<b>Offeror Qualifications</b>			
Years in Business	5	4	This company has been in business since 1980, small, family firm with limited staff capacity.
Relevant Experience	10	5	Completed the California FMR's, but no outcomes of the studies were provided. This company didn't focus on FMR services but other surveys in general. The responses appears to have completed two counties in CA but limited experience for statewide FMR surveys.
Relevant Past Projects	10	5	The response showed they have done two counties in California, but they have limited experience for statewide surveys. The listed surveys do not show any outcomes, and didn't focus on HUD FMR surveys but others.

<b>Offeror (Company) Name:</b> Applied Survey Research		<b>Total Points Awarded:</b> 26	
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
Resumes of Key Personnel	10	5	The resumes for the staff were attached, the principle seems qualified, but the other staff are not as strong in the FMR, no explanation of roles in conducting the Montana study. There is no specific experience in FMR studies, and no explanation of who will do what.
Service Organization's Internal Control Assessment	Pass/Fail	P	
Internal Control Assessment	Pass/Fail	P	
<b>Cost Proposal</b>			
Cost Proposal	20	20	
<b>Equal Pay for Montana Women</b>			
Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points	5		
<b>Highest Scoring Offeror's Only</b>			
Reference # 1	Pass/Fail		
Reference # 2	Pass/Fail		
Financial Stability	Pass/Fail		

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<b>Offeror (Company) Name:</b> Econometrica, Inc			<b>Total Points Awarded:</b> 81
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<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
<b>Provision of Services</b>			
Complete contact information provided	Pass/Fail	P	
Methodology Plan	10	9	The plan provided was robust in nature and gave two different options. The statewide surveying would be completed using online social media, paper, call center, with a follow up focus on rental mailing lists for proprietary presumed renters with ABS filtering. They will maximize online email surveys, text reminders, 100% focus survey distribution on metropolitan statistical areas and counties with highest current voucher use, will they rely on Commerce to provide that?
Work Plan	10	8	There was a clear statewide work plan with deliverables, including updates but it will require data report delivery within the time frames, to reach as many renter households as possible. They did provide alternative options to meet the statewide requirement with reliance on the department and others. On page 16 of the response, they state “we will rely on the department to send the surveys out” the department does not have the bandwidth to participate that heavily in the survey. The second solution was based on funding, but I liked the effort put into the situation. This was a very detailed response with dates but Commerce will need to do some low bandwidth work as well.
Scope of Work Question Responses	10	7	The experience of these surveys is that 60% tend to be younger and are more likely to prefer online tools, there was an interesting comment on tribal lands that suggests that HUD’s design may limit the responses from renters on reservations, for example, no family owned, subsidized or occupancy for more than two years, etc. They will work on collaboration with us but will be putting work on Commerce. A comprehensive response to question 1, but will remove PO Boxes but did not provide a solution to address that issue, rural tribal surveying is not as well understood in response.

<b>Offeror (Company) Name:</b> Econometrica, Inc		<b>Total Points Awarded:</b> 81	
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
Timeline of Work and Deliverables	10	10	Timeline and work deliverable meet dates, delivery was clear with a detailed plan to complete all work projects with deliverables. Can submit a report to Commerce by 12/31/24 for review.
<b>Offeror Qualifications</b>			
Years in Business	5	5	A long-established firm with 26-years of experience, including a reasonable capacity to perform surveys. Business started in 1998 which involves surveying since 2008, and almost 20 years supporting HUD.
Relevant Experience	10	9	The company has extensive experience dealing with surveys and tribal reservations, team members only included two resumes who reference surveys. They listed numerous large cities for FMR and have access to HUD key staff, and long-time vendors in the field, with 50% of successful studies completed in 2022 focused on FMR studies.
Relevant Past Projects	10	9	The company has worked in lots of larger areas that exceed Montana's population, however, no statewide surveys are listed. Completed numerous FMR projects, and leaders in the field, but no similar rural states or regional statewide areas were referenced. Cited multiple FMR surveys as completed on page 13, mostly large MSAs.
Resumes of Key Personnel	10	9	A qualified and experienced team, with relevant FMR surveys and other similar studies, including call center, reflects their capacity. Resumes include only 2 references to FMR surveys and seem to include unrelated experience.
Service Organization's Internal Control Assessment	Pass/Fail	P	
Internal Control Assessment	Pass/Fail	P	
<b>Cost Proposal</b>			
Cost Proposal	20	15	
<b>Equal Pay for Montana Women</b>			
Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points	5	0	
<b>Highest Scoring Offeror's Only</b>			
Reference # 1	Pass/Fail	P	
Reference # 2	Pass/Fail	P	
Financial Stability	Pass/Fail		

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**Fair Market Rent Reevaluation**

**Individual Scoring Matrix**

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of 95 points. The Ability to Meet Provision of Services, Offeror Qualifications and Experience, and Resumes of the proposal will be evaluated based on the following Scoring Guide. The Cost Proposal will be evaluated based on the formula set forth below.

<b>Offeror (Company) Name:</b> ICF Incorporated, LLC		<b>Total Points Awarded:</b> 80
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>
<b>Mandatory Justification Comments for Points Awarded</b>		
<b>Provision of Services</b>		
Complete contact information provided	Pass/Fail	P
Methodology Plan	10	10
Work Plan	10	10
Scope of Work Question Responses	10	10
Timeline of Work and Deliverables	10	10
<b>Offeror Qualifications</b>		
Years in Business	5	5
Relevant Experience	10	10

<b>Offeror (Company) Name:</b> ICF Incorporated, LLC		<b>Total Points Awarded:</b> 80	
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
Relevant Past Projects	10	10	Experience in HUD FMR studies, with older projects in VT. The project is relevant to other HUD surveying, they have completed 15 FMR surveys since 2012, and listed the last 5 years with 4 relevant projects in the metro areas.
Resumes of Key Personnel	10	10	Some staff have been involved in surveys with extensive survey experience, but field staff have no relevant experience in FMR surveys. Lots of FMR experience from the team and included senior advisor to projects, well-qualified team, with clear roles and responsibilities, defined large firm staff capacity.
Service Organization's Internal Control Assessment	Pass/Fail	P	
Internal Control Assessment	Pass/Fail	P	
<b>Cost Proposal</b>			
Cost Proposal	20	5	
<b>Equal Pay for Montana Women</b>			
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<b>Highest Scoring Offeror's Only</b>			
Reference # 1	Pass/Fail		
Reference # 2	Pass/Fail		
Financial Stability	Pass/Fail		



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**Fair Market Rent Reevaluation**

**Individual Scoring Matrix**

The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of 95 points. The Ability to Meet Provision of Services, Offeror Qualifications and Experience, and Resumes of the proposal will be evaluated based on the following Scoring Guide. The Cost Proposal will be evaluated based on the formula set forth below.

<b>Offeror (Company) Name:</b> Washington State University		<b>Total Points Awarded:</b> 66	
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
<b>Provision of Services</b>			
Complete contact information provided	Pass/Fail	P	
Methodology Plan	10	8	They will be doing paper surveys through USPS only, no web-based surveys. Gives explanations of methods and will seek approval from HUD if the work plan is accepted. They provided a good understanding of the project and challenges but offered less than a survey statewide approach.
Work Plan	10	6	They gave us 2 work plans and explained why one is better than the other, including maps and field agency regions. This will need to be approved by HUD for SESRC and recommend prioritizing any counties with less than 20% FMR value. This response was robust, with a good understanding of the project and rules out statewide surveys but will be reliant on the department. Does not recommend surveying rentals on reservations or counties with a 30% increase in fiscal 25 FMRs, this would exclude Helena, Lewis & Clark County, Bozeman, and Gallatin County in particular.
Scope of Work Question Responses	10	8	Raise important challenges but discount the statewide approach and surveying on reservations, provide numbers on potential rentals by county and required responses from which was a nice detail level. They gave good statistics and examples of different methods that won't work.
Timeline of Work and Deliverables	10	7	All responses will be completed by USPS, which will be slow, and no guarantee on the number of responses. The timelines have details although if awarded, they will submit responses to surveys on 1/25/25 which will be after the HUD timeline. Client work product is different than the RFP, statewide focus may not meet HUD deadlines.
<b>Offeror Qualifications</b>			
Years in Business	5	5	One of the previously preferred vendors to conduct FMRs via telephone, long-time ended in the field of 30+ surveys, the site was established in 1970.

<b>Offeror (Company) Name:</b> Washington State University		<b>Total Points Awarded:</b> 66	
<b>Category</b>	<b>Possible Points</b>	<b>Points Awarded</b>	<b>Mandatory Justification Comments for Points Awarded</b>
Relevant Experience	10	9	Survey expertise in HUD and FMR, and tribal survey experience have been noted. HUD contract was aged, cited at least 6 HUD FMR studies, but nothing statewide. HUD was listed as one of the preferred vendors via telephone, used stations for data entry, and DC work for survey design, agencies also include several possible rentals, including the tribal reservations.
Relevant Past Projects	10	9	HUD FMR studies were completed in WA and OR, experience in surveys on reservations, but no large rural statewide studies. They listed 6 past projects, all within the metro areas, no regional FMR or surveying on reservations.
Resumes of Key Personnel	10	9	They listed 4 key personnel with relevant experience, project lead is well qualified, but does not have as much housing experience as other members. Identified staff and good experience in surveys and some specific that had FMR evaluations.
Service Organization's Internal Control Assessment	Pass/Fail	P	
Internal Control Assessment	Pass/Fail	P	
<b>Cost Proposal</b>			
Cost Proposal	20	5	
<b>Equal Pay for Montana Women</b>			
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<b>Highest Scoring Offeror's Only</b>			
Reference # 1	Pass/Fail		
Reference # 2	Pass/Fail		
Financial Stability	Pass/Fail		

**COM-RFP-2025-0057AB  
Fair Market Rent Reevaluation**

**Cost Worksheet**

Lowest overall cost receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. Example: Total possible points for cost are 300. Offeror A's cost is \$20,000. Offeror B's cost is \$30,000. Offeror A would receive 300 points. Offeror B would receive 200 points ( $\$20,000/\$30,000 = 67\% \times 300 \text{ points} = 200$ ).

Cost	
<b>Points Available</b>	<b>20</b>
Lowest Cost	\$ 225,000.00

Vendor Name	Proposed Cost	Points Earned	Notes:
Applied Survey Resear	\$225,000.00	20.0	
Economerica, Inc	\$299,893.25	15.0	
ICF Incorporated, Inc	\$999,983.74	4.5	
Washington State Univ	\$908,500.00	5.0	

## Technical Scoring Session

COM-RFP-2025-0057AB  
Fair Market Rent Reevaluation

Date: 9/16/24

Time: 8:30 AM - 3:30 PM

Location: Microsoft Teams

Evaluation Committee Members: Joe DeFilippis, Kelly Shields, Michael O'Hare (Helena Housing Authority)

Subject Matter Experts: Benjamin Gill

Contracts Officer: Amanda Battin, amanda.battin2@mt.gov

Order of Evaluation: Alphabetical

Scoring Method: Consensus

**COM-RFP-2025-0057AB**  
**Fair Market Rent Reevaluation**

**SCORING GUIDE**

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

**Superior Response (95-100%):** A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the agency.

**Good Response (75-94%):** A good response clearly meets all the requirements of the RFP and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

**Fair Response (60-74%):** A fair response minimally meets most requirements set forth in the RFP. The offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

**Failed Response (59% or less):** A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated sufficient knowledge of the subject matter.