

Hiring Private Planning Consultants & Preparing RFPs

How cities and towns can effectively
procure & use consulting planning services

*Citizens Training Planning Service Conference
March 16, 2019*

MACP

Massachusetts Association of Consulting Planners

Introduction

Massachusetts Association of Consulting Planners–MACP

■ **Panelists**

- **Leonardi Aray, AIA**, Principal, Leonardi Aray Architects
President, MACP
- **Anne McKinnon, AICP**, Jacobs Engineering
- **Kathleen McCabe, AICP**, McCabe Enterprises

- **Moderator:** Bruce Hughes -- CTPC

Today's objectives

- To learn keys to a successful process that leads to hiring the right planning consultant
- **Tips on preparing an effective RFP**

A fair and open procurement process is in everyone's interest

RFQ

QUOTE

IFB



RFP

RFI

30B

What is 30B?

- **State statute governing procurement**
- **30B Establishes standards, requirements and thresholds for procuring goods, commodities and services, including planning services**
- **Design services are procured under a separate statute. We are not discussing procurement of design services nor construction.**

The 30B Framework

Under \$10,000

- Sound business practice



\$10,000 to \$49,999

- Quotes
- **Must Solicit at Least 3 Venders**
- May Advertise More Widely
- **Written Quotes Needed**
- Decision Point: **PRICE -- \$\$\$**

Over \$50,000:

- Issue IFB or RFP
- **IFB**
 - Decision Point: Price After Minimum Quality Standards are Met.
- **RFP**
 - Decision Point: Quality -- Most Advantageous Proposal

Note: Local rules may dictate more rigorous procedures.

IFBs & RFPs – Requirements & Differences

IFBs

- Scope
- Evaluation Criteria – Yes/ No Standards
- Rules for Award
- Contract Terms & Conditions
- Standard Forms
- Submission Requirements
 - Sealed Bid
- Decision Point: PRICE \$\$\$

RFPs

- Scope
- Evaluation Criteria
 1. Minimum Standards: Yes/ No
 2. Comparative Evaluation
 3. Lowest Price (separate & after evaluating Comparative Criteria)
- Contract Terms & Conditions
- Standard Forms
 - Submission Requirements
- Decision Point: Most Advantageous Proposal

Over \$50,000:

Additional requirements for IFBs & RFPs

- **What does the IFB or RFP need to include?**
 - Date, time and location for receipt of bids;
 - Description of services and evaluation criteria; and
 - All contractual terms and conditions.
 - Dangers of including standard form or prior form agreements not specific to the Project.
- **Proposals Are Sealed**
- **Minimum Notice Requirements**
 - Must include specific information
 - “Reasonable time” and must be published in newspaper and on COMMBUYS **at least once not less than two weeks prior to submission deadline.**
 - Posted in your jurisdiction’s office.



Soliciting Professional Services

1. **Advertise with MACP**
 - **FREE !!!**
2. **Mass Planners ListServ**
3. **Local Paper**
4. **Post at Town Hall/ City Hall**
5. **Submit to Central Register**
6. **COMMBUYs**
7. **Submit to Goods & Services** (must do if over \$100,000)

Getting the Best Planning Services through RFPs

Why Outsource Consulting Planning Services?

- You lack the necessary **expertise** in-house
- You don't have **time**
- You could use help to **Build Consensus**
- You need the **objectivity** or **credibility** a consultant can lend to a given situation
- You need help to navigate and diffuse **political controversy**
- You could use some **examples from other communities**
- A **consultant** or a team of consultants can provide a **wide range of services that can be tailored to your needs**

ADVANTAGES of a Private Consultant

- **Broader base of experience**
- **Team tailored to needs of project**
- **Often provides new perspectives & innovation**

“In the old days”:

Before Today’s Workshop, March 16, 2019

- Copycat RFPs
- Inconsistencies with Chp. 30B, i.e. RFP vs RFQuotes
- Inconsistent and unrealistic scope and timeline
- Private consulting planners confused and frustrated
- Unnecessary insurance requirements
- Lack of resources to prepare an effective RFP

What are some red flags to prospective bidders?

- A **scope** that is **vague** or incompatible
- An **unrealistic budget**
- Inappropriate or **unrealistic evaluation criteria**
- **Unrealistic proposal submittal deadlines**
- **Conflicting requests**
- **Unnecessary requirements**
- **Concerns with fairness**

When the RFP does not state a clear purpose & requirements, it's hard to feel confident about responding

Request for Problems

Unclear or Contradictory Instructions

Example: Instructions regarding number of copies, etc.

- *“Please provide 15 copies, 1 original and an electronic version of the proposal. Copies must be single-sided.”*
- *“Please provide 8 copies of the proposal (on another page)”*
- *“Please address issue of sustainability in scope of work (on another page)”*

Request for Problems

Budget & Scope Mismatch

- Budget too small to support the amount of outreach/ meetings requested and actually do the technical work
- No budget included
 - Difficult to write a scope when we don't even know what degree of effort is expected (based on available funds)
- Attempts to save time & money by: “city will handle all coordination with other agencies. Consultant need not participate.”
 - Information becomes filtered – Consultant doesn't really learn the situation

Request for Problems

Expectations & Schedule Mismatch

Examples:

- Town wants study of impact of beach activities on traffic and local economy but issues RFP in October with study to be complete in June
- RFP has a firm completion date, but consensus takes time and flexibility and “there’s no time”

Request for Problems

Evaluation Criteria Poorly Stated &/or Appears to Preclude Qualified Respondents

Example:

“Comparative Criteria:

- *“Highly Advantageous: Awarded contract by the Town Manager’s Office & Town of _____ to provide similar services in the past five years. “*

Request for Problems

Fishing Expeditions

- **RFP asks for proposal when money has not been committed.**
 - It results in a lot of effort on the part of the consultants to prepare proposals for a project that never gets funding.
- **RFIs which request consultants to essentially write a scope of services and budget for projects to be RFP'd**

Request for Problems

MBE-WBE vs Cultural competency

- *...all qualified Minority-Owned Business Enterprises (MBE) or Woman-Owned Business Enterprises (WBE) are strongly encouraged to submit proposals in response to this Request for Proposals...* (from an RFP)
- No discussion on cultural competency)

Request for Problems

Insurance requirements

Example: *Commercial liability coverage in the amount of \$1 million per occurrence, with a \$2 million umbrella policy.*

- **Right-size Insurance Requirements to Scope/ Budget**
- **Inform proposers of Insurance Requirements in RFP, but Require Verification Only Following Award**
- **Get help with this!**
 - **Use Local Resources – Procurement Officer; Town Counsel**
 - **Think & Talk Through Risks – Use Reasonable Insurance Requirements**

Unrealistic expectations: Budget, Scope, Schedule (BSs!!)

Result in:

- No or fewer proposals submitted
- Proposals from experienced consultants who might:
 - Ask for additional funding or contract extension later
 - Reuse boilerplate reports
 - Use as much of agency time as possible

Unrealistic expectations: Budget, Scope, Schedule (BSs!!)

Expectations should be based on estimated need and budget available:

- Meetings
- Schedule
- Outreach to “hard to reach populations”
- Data collection and research
- Requirement for graphics, maps, visualization tools and color reports
- Building consensus
- Implementation Plan

Interviews

- **MACP recommends interviewing**
- **Potential for interviews – state in RFP**
- **Interview respondents that only meet the minimum requirements stated in the RFP**
- **Short-list and interview highest ranked on comparative criteria**
- **Public Meeting Interviews**
- **Interview Panels**
 - **Consistency and Presence**

The Morning After:

Consultants don't like it when...

- Unsuccessful bidders are not notified
- Evaluation process goes beyond the terms stated in the RFP
- No opportunity for feedback on the proposal

Debriefs provide an opportunity for both the awarding entity and the respondent(s) to gain insights into the RFP and interview processes, which can benefit both the municipality and the consultant in the long run.

How to write an effective RFP

- **TIP #1:** Plan for the RFP. It Takes Time
- **TIP #2:** Evaluate current resources how much can be done in-house.
- **TIP #3:** Get input from relevant Town staff and agencies on available data; consider hiring a consulting planner to outline a scope and craft the RFP
- **TIP #4:** Collect readily available data & identify additional data needs



How to write an effective RFP

- **TIP #5:** Determine value of consultants with **cultural sensitivity**
 - **Methods** for reaching “hard to reach” populations
 - **Bi-lingual materials**
 - **Understanding** of cultural differences
 - **MBE/DBE** is not equivalent to cultural competence



How to write an effective RFP

- **TIP #6:** Evaluate degree of **stakeholder engagement**
- **TIP #7:** Identify areas of **expertise** needed
- **TIP #8:** Define the **timeline**
- **TIP #9:** Carry a **budget** contingency
- **TIP #10:** Make it easy to read!



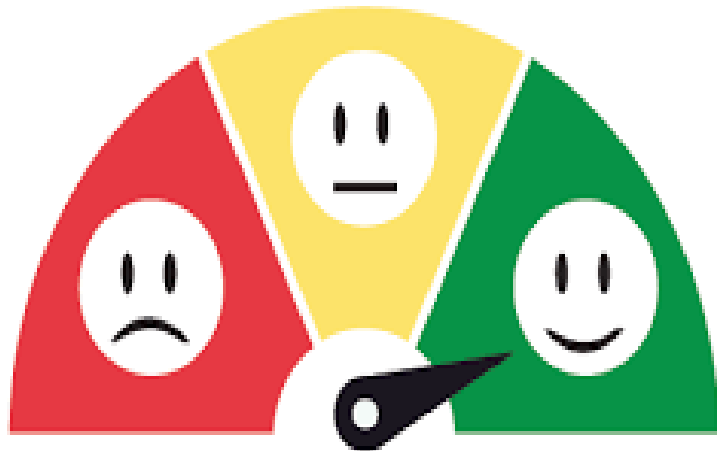
Write an effective RFP and you will hire a firm best suited to assist you with your planning efforts

A firm or team of firms that:

- Has the skills and experience with the kind of work you would like done
- Works closely with clients to customize their approach
- Demonstrates a high level of interest in your project
- Has good reviews from their references



**Questions?
Comments?**



**Your stories
Your experiences**

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www.MACPonline.org

Thank You

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