

RFP: Request for Planners

How agencies can effectively procure &
use consulting planning services

CTPC

March 17, 2018

The logo for the Massachusetts Association of Consulting Planners (MACP) features the letters 'MACP' in a large, bold, purple, sans-serif font. The letters are closely spaced and have a slight shadow effect.

Massachusetts Association of Consulting Planners

Introduction

- **Massachusetts Association of Consulting Planners (MACP)**
- **Panelists**
 - Ralph Willmer, FAICP, MAPC: Moderator
 - Leonardi Aray, AIA, Principal, Leonardi Aray Architects
President, MACP
 - Daphne Politis, AICP, Principal, Community Circle
 - Sarah Raposa, AICP, Town Planner, Medfield, MA
- **Acknowledgments**
- **Upcoming MACP Procurement Handbook**

Today's objectives

- To define the **role of private consulting planners**
- To understand the procurement process from the **public sector planner's point of view**
- To understand how to **improve the procurement process** so that it is mutually beneficial to both public and private sector planners.

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

Procurement Thresholds

- Below \$10,000 –Can be awarded using “sound business practice” so your local jurisdiction receives the needed quality of supplies or services at a reasonable price.
- Between \$10,000 & \$49,999 (lowest bidder) – Must seek written quotes from at least three vendors. Ensure that you adequately describe what you need.
- \$50,000 and over – Sealed Invitation for Bids (IFB) or Request for Proposals (RFP). Award to the responsive and responsible bidder offering the best price – the best value.



Year 2018: Before MACP's Handbook

- Copycat RFPs
- Inconsistencies with Ch. 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

Notes from a Small-Town Municipal Planner



- Been a municipal planner for 10 years in 3 small-ish, rural / suburban communities
 - 2008 in Eastham (pop. ~5,000)
 - 2010 in Westport (pop. ~15,000)
 - 2012 in Medfield (pop. ~12,000)
- Sole planner
- Limited funding available for special projects

First RFP: Housing Production Plan



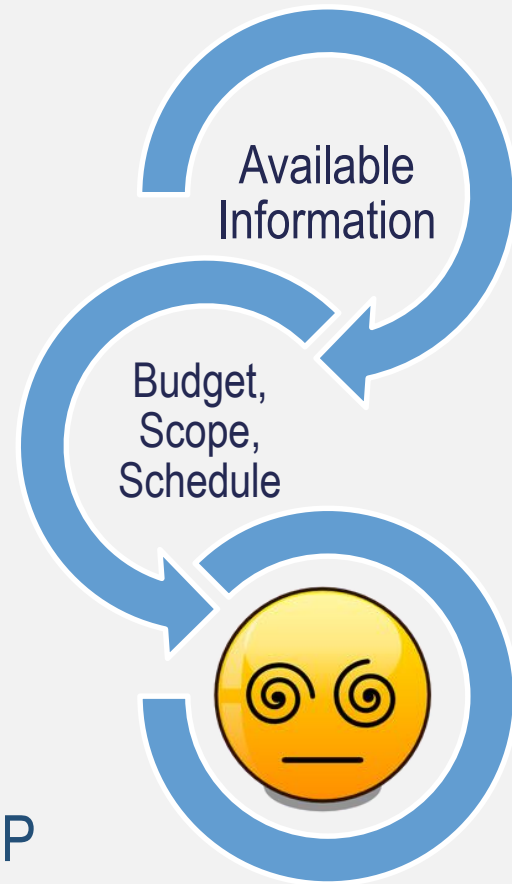
The agony of procuring services



- Knowledge base
 - Resources
 - Templates
- Who does the Work?
 - In-house work
 - RPA
 - Consultant
- Developing Budget
- Time commitment
- Communication
 - Interview & Evaluations
 - Contracts, Invoicing & Payments

10 years in...

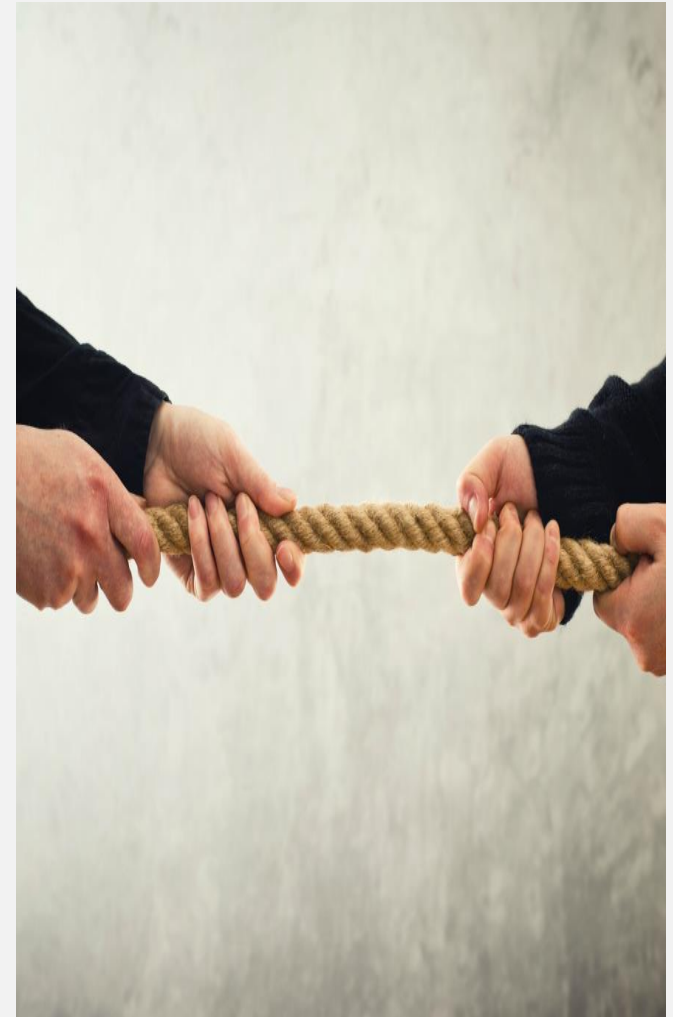
- Sources of confusion
 - Pairing scopes with funding
 - Tell or not to tell (amount)
- Issues I've experienced
 - Working with a committee to draft RFP
 - Burn rate vs. project based fee
- Reflect on what your purpose is
 - How will this further your mission and fulfill goals



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Why Outsource Consulting Planning Services?

- You lack the necessary **expertise** in-house
- You don't have **time** and/or **need to complete by a specific date**
- You could use some help to **Build Consensus**
- You need the **objectivity** or **credibility** a consultant can lend to the process and/or the result
- You need help to navigate and diffuse **political controversy**
- You could use some **examples from other communities**



Why Outsource Consulting Planning Services?

- A **consultant** or a team of consultants can provide a **wide range of services**, including:
 - land use
 - transportation
 - economic development
 - urban design
 - housing
 - natural and historic resources
 - even architecture and engineering



Should you hire a Private Consultant or a RPA?

ADVANTAGES of a RPA

- Typically lower cost
- Intergovernmental agreements in place
- Often knowledgeable about town or city

ADVANTAGES of a Private Consultant

- Broader base of experience
- Team tailored to needs of project
- Often provide new perspectives

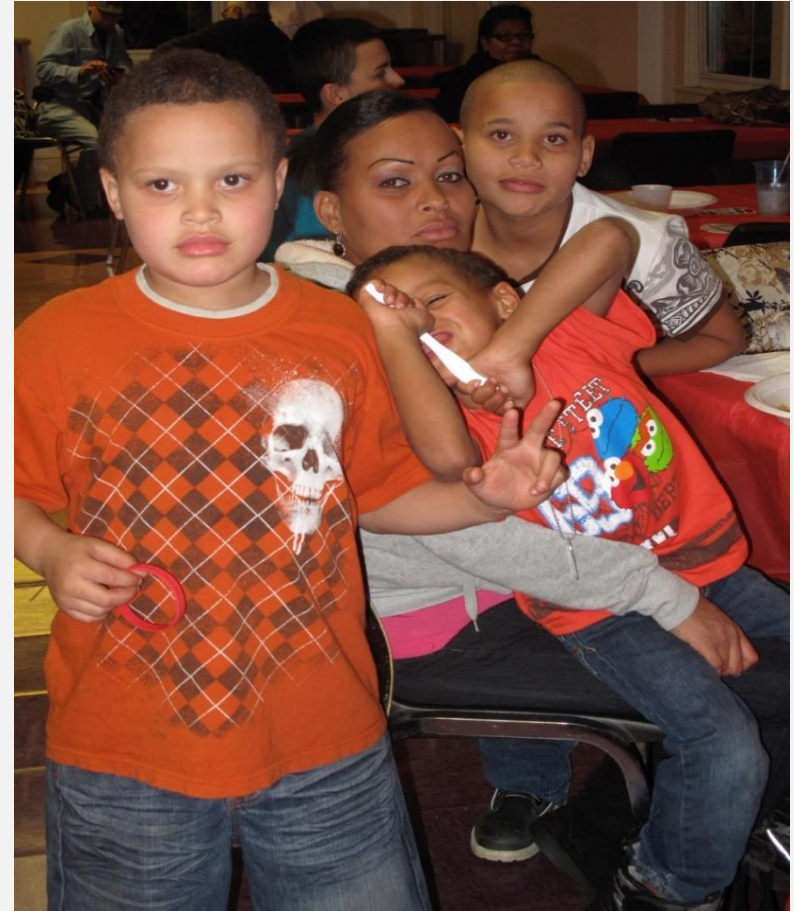
How to write an effective RFP

- **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 RPA; consider hiring a consulting planner to outline a tentative 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!



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 deadlines**
- **Conflicting requests**
- **Unnecessary requirements**
- **Concerns with fairness**

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

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

Expectations should be based on needed:

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

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

Result in:

- No proposal submitted
- Proposal from inexperienced consultants
- Proposals from experienced consultants who intend on:
 - Asking for additional funding or contract extension later
 - Reusing boilerplate reports
 - Using as much of agency time as possible

Consultants don't like it when...

- proposals are posted on websites (some consultants)
- unsuccessful bidders are not notified
- the evaluation process goes beyond the terms on the RFP
- there is no opportunity for feedback on the proposal

Consultants want to feel that their time and thoughtful response has been respected, even if they are not selected.

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

Year 2035

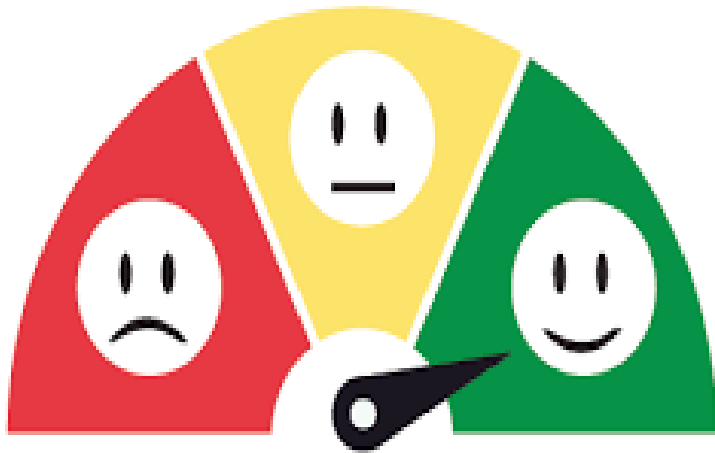
MACP's Handbook, 3rd Edition

- **Adequate funding** for planning is committed annually.
- Private-Public Sector Planners **effective collaboration**
- **Copy & Paste** tool banned
- Municipal Planning Initiatives reflect and serve **diverse demographics**





**Questions?
Comments?**



**Your stories
Your experiences**

What would you like to see in the Procurement Handbook?

Preliminary Outline

- Why Use A Private Consultant
- Overview of the Procurement Process
- Frequently Asked Questions
- Sample RFP Outline
- Tips for Writing Good RFPs
- How to Get the Most Out of Your Planning Consultant

We Want the Handbook to be useful.

WHAT ELSE SHOULD WE INCLUDE?

**Mass Association of
Consulting Planners
Planners Directory**
www.MACPonline.org

thank you