

**RFPs:
Finding a
Perfect Fit**

Michigan Association of Planning
2018 Annual Conference
Grand Rapids | September 20, 2018

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Introduction
Brad Strader, MKSK

Topics for this Session

- Using a Consultant – The Basics (Sarah Traxler)
- Preparing an RFQ/RFP (Brad Strader)
- RFPs Best Practices (Carmine Avantini)
- The Interview and Contract Negotiation Process (John Enos)

The Consultant Perspective
The Proposal Preparation Effort

The Proposal	Hours Involved
○ Evaluation of RFP, determine go or no/go	2-4
○ Communications to form a team	1-2
○ Preparing qualification materials	2+
○ Cover letter	1-2
○ Research/Site Visit	4+
○ Writing up a tailored scope of work	8+
○ Prepare custom materials	4-6
○ Preparing a budget	2
○ Final Review	2-4
○ Assembly	4
○ TOTAL	28 - 38+

The Consultant Perspective The Proposal Preparation Effort

The Interview	Hours Involved
○ Preparation, practice, etc.....	4
○ The Interview (inc. travel, 2 attending).....	10
○ TOTAL	14

The Consultant Perspective The Proposal Preparation Effort

The Take-Away:

- Hours Invested (42-52) = \$4,200 - \$5,200 (and more for a complex RFP)
- Assume 10% profit - need \$42,000 - \$52,000 to break even (not including payment to subconsultants)
- So Responding to an RFP is a significant investment by the consultant!

Using a Consultant, The Basics

Sarah Traxler, McKenna

Benefits of Using a Consultant

Benefits

- Flexibility of service – no municipal obligation (on-call scenario)
- Maintain quality of service during overwhelming work periods
- Diversity of skills, specialties
- Outside lens on your project, community, strengths, etc.
- Direct saved staff time to other initiatives
- Can lead to Internal Innovation

What's the Right Approach for My Project?

Deciding between staff, private planning consultant, County, region, etc.

- Schedule, Budget, Quality (three pillars)
 - Your staff's time is quantifiable with real costs – don't underestimate required resources
 - What am I choosing to maximize and which approach best aligns?
- Accountability
- Advocacy
- Focus
- Talent alignment



Source: planningpeeps.com

Typical Roles

On-Call Services

Staff	Consultant
Main contact with electeds	Supports staff with electeds
Attends PC, Council / Board, etc.	Often attends PC, Council / Board, etc.
Assigns development reviews, etc.	Prepares development reviews, etc.
Performs counter-work / pre-apps, etc.	Participation varies

Special Projects

Staff	Consultant
Main contact with elected	Supports staff with elected
Attends PC, Council / Board, etc.	Attends agreed-upon meetings
Manages work of consultant	Performs work per agreement
Provides background info	Analyzes background info
Available to provide comment	Responsive to client

Pricing Models

On-Call Services

1. Development Reviews	2. Office Hours
Per agreement with consultant:	
<ul style="list-style-type: none"> • Fixed review fees Often base price + per-unit charge; should align with City fee schedule • Applicant pays fee(to cover review) and/or pre-set escrow 	<ul style="list-style-type: none"> Retainer for set hours Hourly fees for varied or set hours Often not fee-driven


Special Projects

3. Often "Lump Sum"
<ul style="list-style-type: none"> • Almost always paid for by municipality; developers occasionally subsidize

Be Deliberate – Plan for Projects!

How do you determine the skills and experience you're looking for?

- Solicit background from your counterparts in other towns
- Write and workshop a purpose description for the project itself; go beyond "to comply with MPEA"
 - What's order of importance for three pillars? (Schedule, Budget, Quality)
 - Discuss meaning of "quality" in this context
- Review qualifications / proposals in context of your priorities
- Then, sprinkle in the personal elements
 - Fit of project team, public engagement approach



Source: Jeff Weeber

Single vs. Team

Consider / study / confirm the following:

- If have existing relationship:
 - Can my preferred planning consultant expertly perform the services I need?
 - If not, are they willing to bring in a partner to augment their experience?
- If issuing RFP/O "cold":
 - Ask for specific details on whether a sub-consultant is proposed as part of team
 - Consider whether one firm could get the job done to your standards
 - Local knowledge + national / special expertise sometimes a benefit
 - If team, is prime consultant charging more for managing more partners? Worth it?

Advertising

Cast a wide net or send to few who are clearly qualified?

Ideas for "wide net":

- MAP - Planningml.org
- MAP PIPP list (Planners in Private Practice)
- APA - Planning.org
- Planetizen.com/RFP
- Direct mail to advertisers in relevant publications

Proposal Efforts

We ALL want to partner

We ALL invest heavily when compete

- Telephone / email questions and answers + dialogue
- Research on past planning efforts, current events, etc.
- Gathering teammates (when applicable)
- Develop creative approach
- Develop tight-sized approach (especially difficult when don't know budget!)
- Staff time in producing quals / proposal documents
- Interview prep and attendance... ...+ loss of sleep and sanity!

Do I Have To?!


What if you already know who you want to hire?

- Professional services = not bound by lowest price
- Review purchasing ordinance to ensure consistency
- Work closely with purchasing, if applicable
 - Help inject "common sense" into approach
- If certain, avoid going through effort (wastes your time, too!)

Preparing an RFQ/RFP

Brad Strader, MKSK

First off,
Is it a "Q"
or a "P" ?



Source: Muppet Wiki

Different Tools for Different Steps of the Process

"Q" vs. "P"

<p>Request for Qualifications (RFC)</p> <ul style="list-style-type: none">○ Introduce the Firm/Team○ Demonstrate relevant experience○ Demonstrate firm's understanding of the project○ May ask the firm to describe a general approach they would take to complete the project	<p>Request for Proposals (RFP)</p> <ul style="list-style-type: none">○ Detailed, formal proposal, including:<ul style="list-style-type: none">○ Scope of Work○ Schedule/Timeline○ Proposed Fee○ Additional Services (optional)
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"Q" vs. "P"

Request for Qualifications (RFQ)

- Benefit to Client:
 - Minimize review time by narrowing down potential consultants before issuing RFP
- Benefit to Consultant:
 - Typically shorter/less time-intensive to prepare

Request for Proposals (RFP)

- Benefit to Client:
 - Can review comparable proposals from competing consultants
- Benefit to Consultant:
 - Can customize the proposal to client's needs

Is it both? (Combined RFQ/RFP)

- Most typical approach
- Benefit to Client:
 - Minimize staff preparation and advertising by eliminating 2-step process
- Benefit to Consultant:
 - Minimize (potentially) the overall project pursuit timeline
- Potential Drawbacks:
 - Client may receive more submissions, requiring additional time/resources to review and compare
 - Consultant may spend much time/resources to prepare without the benefit of client indicating interest in advance

Basic Structure of an RFP

Typical Contents

- Project Purpose
- Background Information
- Minimum Qualifications/Areas of Expertise
- Scope of Work
- Required Deliverables
- Project Schedule/Key Deadlines
- Budget or Fee Proposal Criteria
- Evaluation & Selection Process
- Contact Information/Procedures
- Terms & Conditions/Legal Requirements




Considerations for Preparing a Good RFP

- Clearly outline the proposal structure for easier comparisons
- Describe the specific services or project tasks needed
- Identify the expertise desired – what type of consultants do you need?
- Describe the previous plans and policies that need to be considered – link to them online if possible
- Who will the consultant be working with: staff, officials, committees?
- If municipal staff are available to assist, describe that in some detail – what tasks or products, how many hours?
- Outline the general level of public involvement desired
- Any goals or requirement for DBE, WBE, local firm? Or other special contract requirements (like insurance, local business license)?
- Project schedule – how important is it compared to other project objectives?
- Pros and cons of budget details

The Do's & Don'ts of RFPs

Or
How to keep your consultants from banging their head against the wall



Do's and Don'ts

DON'T ❌

- Call it an RFQ, but require an actual proposal
- Throw in the kitchen sink
- Develop RFP by committee
- Copy and paste (at least without proofreading!)
- Include contradictory requirements
- Be unreachable
- Overly micro-manage the scope

DO ✅

- Be clear about the process
- Prioritize what you want/need
- Assign a lead RFP writer
- Spend time writing an RFP that will tell consultants the client is serious about the project
- Make the proposal specifications and submittal procedures simple, clear and consistent
- Provide contact information and be available for questions
- Allow the consultant to be creative and propose an alternative approach

Do's and Don'ts

DON'T ❌

- Require a list of other commitments or available hours of personnel
- Use bid language for a professional service RFP
- Overpromise what staff can do or time available
- Require an overly detailed fee and hours breakdown for individual tasks, individual personnel and all expenses
- Expect consultant to attend "all meetings necessary"

DO ✅

- Recognize that consultants are busy (you are too!). Judge them based on their qualifications, approach and fee.
- Treat planning projects like planning projects – flexibility and creativity are your friends
- Be realistic – Is this an effort to save money, or to keep staff engaged? You are spending resources either way.
- Consider how important this really is. If at all, keep it general (e.g. overall hours by personnel assigned to the project)
- Recognize that meetings cost time and money. Allocate a contingency budget for additional meetings that may arise.

Do's and Don'ts

DON'T ❌

- Ask for free work
- Be silent on the budget
- Issue an RFP that is clearly written to favor a particular firm or team

DO ✅

- Allocate a stipend budget if the proposal or interview requests some sort of preliminary deliverable
- Consider publishing the budget. If no budget is allocated yet, be up front about that in the RFP.
- If you know who you want, direct select if you can.

Definite Don'ts (at least from a consultant's perspective)

- List a budget but also encourage a lower or more "competitive" fee
- Public interviews or interviews open to competing teams
- Post proposals online in the middle of the selection process

RFPs Best Practices

Carmine Avantini, CIB Planning

Contact with Consultants

- Complete Information = Good proposals
- Some proposals require all contact through purchasing department
- Open lines of communication with consultants
- Consider pre-proposal meeting for larger projects

Providing Budget Information

- Community might be concerned about getting value for fee
- Consultants base fee on scope and assigned professionals
- Most RFP's are not detailed enough to receive comparable submissions
- Providing budget information better helps communities align with consultants appropriate for that project
- Make sure the money is committed before sending out RFP
- Helps eliminate wasting the time of both community administrators and consultants

Who's Paying for the Project?

- Detail how the project is being funded in the RFP
- Outside funding may add to the administrative cost of the project
- Consultant may have prior experience with funding programs
- Can lend insight into how it might be managed differently from other similar projects
- Funding programs might have prolonged payment timeframes

Describe Program Requirements

- Projects funded using programs with agencies such as MEDC, EDA, MDNR, etc.
- Detail any program-specific requirements in the RFP
 - For example, the Redevelopment Ready Communities Program (RRC) has Best Practice and certification requirements to be met.
- Some federally-funded programs have reporting requirements

Tips for Working with Consultants


- Be clear on expectations
- Make time for communication and feedback
- Follow-through on administrative requirements of the community
- Stay involved in the process and inform the public about progress
- Ask questions!!!

The interview and contract negotiation process

John Enos, Carlisle | Wortman



The RFP Firing Squad – or, The Interview Process



So now you have it narrowed down, now what?

- Selection Committee
 - Planning Commission
 - Elected Officials
 - Administration
 - Others?
- Selection Criteria
 - RFP/RFQ
 - Similar Clients
 - Administration
 - References

The Interview Process

- Select at least 3-4 firms (See Slide #1 Presenter List for good options ☺)
- Dependent upon Selection Committee (e.g. Day or Night?)
- Contact firms a few weeks in advance (Avoid schedule conflicts)
- Attempt to coordinate all on one day
- Suggest 30-40 minutes hour for each firm to present (plus Q&A)
 - Dependent on project type

The Interview Process

- Have set of questions in hand (Leave time for discussion)
- Have other firms leave the interview room (Egads uncomfortable!)
- Be clear on representation (Who will be present at client meetings?)
- What's your gut telling you?

Final Selection

- Contact chosen firm with the Good News!
- Request contract or send municipal contract
- Coordinate any potential issues (Additional meetings, mileage/expenses)
- Meeting with staff and client representatives
- Coordinate introductory kick-off meeting

Final Selection

- Send participation ribbon to the losers (don't leave them hanging with no contact!)
- Contact via mail/e-mail and follow-up with a personal phone call
- Provide constructive critique of the RFP response and interview