

REQUEST FOR PROPOSAL (RFP) GUIDELINES

Planning Projects

The following information is provided to help the grantee develop a Request for Proposal (RFP) to select a qualified consultant or consultant team to complete a planning project funded by a grant from the DCNR Community Conservation Partnerships Program. DCNR requires that consultants be hired using a competitive RFP process for planning and technical assistance projects.

RFP Purpose

- The RFP informs consultants of the availability of a project.
- It provides a detailed project Scope of Work (SOW) and related requirements so that all consultants are considering the same information.
- Proposals from more than one consultant provide an opportunity to compare different approaches to the work, cost proposals, and levels of expertise.
- It provides structure to the consultant selection process to ensure that the SOW is well understood, work requirements and contracting details are not overlooked, and the most cost-effective professional services contract is achieved.

RFP Process

- The RFP process, while competitive, is not a formal process required by state law such as the law governing construction work or purchase of materials and equipment. As a more informal process, it can be molded by the Grantee to best meet its needs. Accordingly, the consultant selected through the RFP process does not have to be the one that submitted the lowest cost proposal. The selected proposal must be cost-effective and responsive to the community and project needs.
- The Grantee must prepare the RFP for Bureau review and approval prior to advertising for proposals. The Bureau requires that copies of the approved RFP be sent to at least five (5) consultants. The Bureau may be able to assist in finding potential consultants; however, the Bureau does not endorse any consultants. The Grantee is encouraged to contact other previously funded agencies to solicit contact information for qualified consultants.

Bureau Approval Process

- Once the Grantee makes a preliminary selection from the list of consultants that responded to the RFP, the Bureau must review and approve the following information prior to executing the consultant contract/professional services agreement:
 - List of consultants that responded to RFP with the cost of each proposal
 - Copy of the selected consultant proposal
 - Letter outlining the rationale for consultant selection
 - Draft consultant contract/professional services agreement

RFP Format

The major components of the RFP are outlined below. The Bureau has also developed an RFP Template that is available on the Grants Portal and Grantees are encouraged to use it. The RFP can take many forms provided it adequately meets Bureau requirements. The format must provide comprehensive information so that consultants can submit a complete and valid proposal.

1. Cover Letter/Announcement

The cover letter/announcement outlines the following information:

- Type of study (e.g. Comprehensive recreation and park plan, master site development plan, feasibility study, stewardship plan, etc.)
- Submission Deadline
- Submission Address
- Any legal clauses required by your solicitor such as: "Your municipality has the right to reject any or all of the proposals, equal opportunity clauses, etc."
- Any requirements from your municipality such as submission in a sealed envelope and marked as "Study Proposal" or separate, sealed submissions for the RFP and the price quote.

The Announcement is used as an introduction to the RFP or as an invitation to interested consultants to request a copy of the RFP. It can also be used as a public notice to be posted and/or published in a local newspaper or website.

If the project is complex or if many consultant proposals are expected, it may be useful to invite interested consultants to a pre-proposal meeting to review the RFP to clarify any details and answer questions. If a pre-proposal meeting is not scheduled, one person should be designated to answer consultant questions so that the information provided is consistent. The designated contact person and telephone number should be provided in the announcement or cover letter.

2. Background Information of Community

The background information helps consultants better understand the community and proposed plan/study and should include the following:

- General information such as location, population, neighboring municipalities, and special features (i.e. growing/declining community, residential/urban/rural in nature, unique demographics, etc.)
- Description of public and private park and recreation facilities
 - Type and acreage of municipal facilities
 - Type and provider of private facilities
 - Existence and role of a park and recreation department and/or board
 - Grantee parks and recreation philosophy
 - Park and recreation budget, etc.
- Plan outcomes such as inventory and assessment of existing facilities, mandatory dedication requirements, identification and preservation of open space, specific facility needs, etc. The Bureau can assist Grantees in developing plan outcomes.
- DCNR Funding Acknowledgment

3. Consultant Qualifications

The Bureau requires that the consultant meet the minimum qualifications for the specific-type of project under consideration as outlined in the Bureau *Consultant Qualifications*. The Bureau requires that the Bureau *Consultant Qualifications* be included in the RFP. The Grantee may add additional requirements, as appropriate.

4. Consultant Selection

The following consultant selection criteria should be considered:

- General qualifications, experience, and expertise of the consultant team
- Experience with the specific project type
- Clarity and completeness of the proposal and the demonstrated understanding of the work to be performed
- Comprehensiveness of the proposed methods and approach to the work such as public participation
- Reference checks and reviews of other documents completed by the consultant
- Consultant's proposed fee

Attendance at a screening interview is sometimes required for a short list of selected consultants depending on the size and complexity of the project and the prior knowledge of the consultants. This can be helpful if there is a selection committee that needs to reach a consensus. It is useful to require the consultant to bring the full consulting team that will work on the project to the interview. Consider providing the consultants a list of expectations for the interview.

If only one proposal is received, it may be accepted subject to Bureau approval and the following conditions:

- Proposal is complete
- Consultant can perform the work required
- Consultant meets minimum qualifications outlined in the RFP
- Total project cost is reasonable and within the project budget

If any of the above conditions are not met, the Grantee may enter into negotiations with the consultant to determine if an acceptable contract/agreement can be executed for a reasonable price.

If executing a contract/agreement based on a single proposal is not acceptable or if a contract/agreement cannot be negotiated, additional proposals may be solicited. The RFP should specify the options the Grantee may pursue if only one proposal is received.

5. Scope of Work (Requested Services)

The SOW must clearly state the objective for the plan/study and the required final products. In most cases the consultant should be permitted to propose changes to the specific tasks to best utilize specialized experience and/or preferred methods.

- Minimum Study Requirements – The Bureau has minimum plan/study requirements as outlined in the SOW Guidelines for the project type. The Bureau-approved SOW must be included in the RFP and it will become a part of the executed contract/agreement.
- Additional Plan Requirements – Include additional requirements such as:
 - Number of key person interviews, study committee, and staff meetings
 - Number of public meetings
 - Required format of the final products
 - Number of draft and final plans, including printing costs
 - Production timelines or benchmarks to measure progress such as first study committee meeting, public meetings, completion of survey instrument, drafts of inventory, survey results, base mapping, color-rendered drawings, etc.

6. Proposal Format

The consultant proposal should include:

- Personnel involved with components of the study
- Personnel hours and cost

- How the consultant will approach the project
- Project schedule
- Costs itemized according to plan elements/tasks
- List of current and past clients as references

7. Consultant and Grantee Responsibilities

The responsibilities of the consultant and the Grantee should be clearly defined.

- Consultant responsibilities may include performing work as outlined in the RFP, submitting progress reports, providing draft and final plans, etc.
- Grantee responsibilities may include assisting with the survey process (be specific on which work elements each party will handle), working with the consultant to gather resources, appointing the study committee, handling meeting notices and conducting meetings, payment of consultant, etc.

8. Additional Information

Include any additional information as required and/or recommended by the solicitor/attorney.

9. Consultant Contract/Professional Services Agreement

Include a copy of the draft consultant contract/professional services agreement as an appendix to the RFP. Request that the consultant submit any concerns regarding the contract/agreement with the proposal.