

Suggestions for an Improved Consultant Selection Process

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I am not an Expert (but I did consult a few good resources)



Contracting for Services: Guidelines for Local Governments in Washington State, MRSC, May 2021 <https://mrsc.org/getmedia/a79caaa4-f96f-4f2b-8a5f-5e0f4afe3bde/Contracting-For-Services.pdf.aspx?ext=.pdf>

Working with Planning Consultants, American Planning Association, Planning Advisory Service Report Number 573, July 2013

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Background

- 13 years in local government
- 8 years in private consulting including 3 years as on-call planning administrator for several small cities



City of Tenino
Washington
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General Context

Agencies have great latitude in setting their own selection policies and procedures.

Purchasing thresholds already set.

Funding sources can dictate process (grant, state, federal).



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Rosters, RFQs, RFPs

Roster: A categorized database of consultants and/or other service providers desiring to provide services to an agency that is established in response to notice or advertisement and that contains statements of qualification (SOQs) and other information that an agency can use to evaluate a service provider.

Request for Qualifications (RFQ): Asks only for firm's general capabilities, list of principals, previous projects, number of employees, licenses, etc. for either a services roster or an individual project.

Request for Proposals (RFP): Typically asks for consultants to identify key personnel proposed for the services and their experience and availability, a general description of the firm's service approach, schedule, and deliverables.

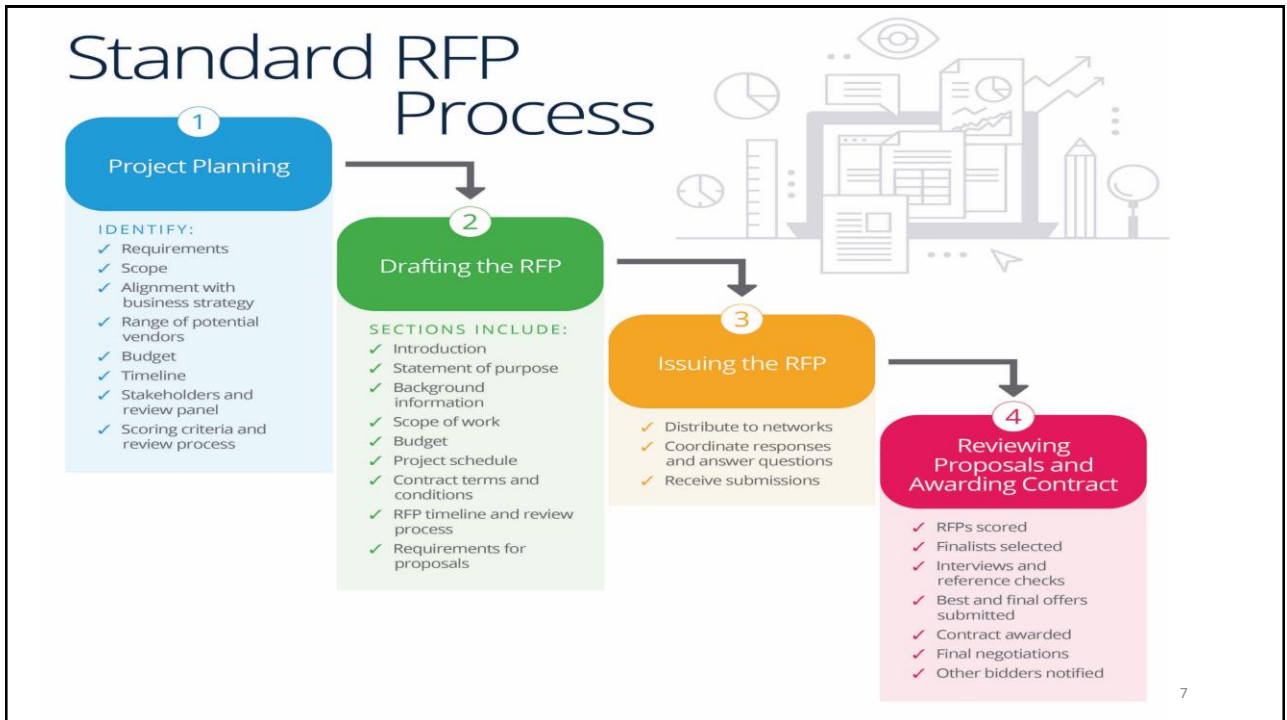
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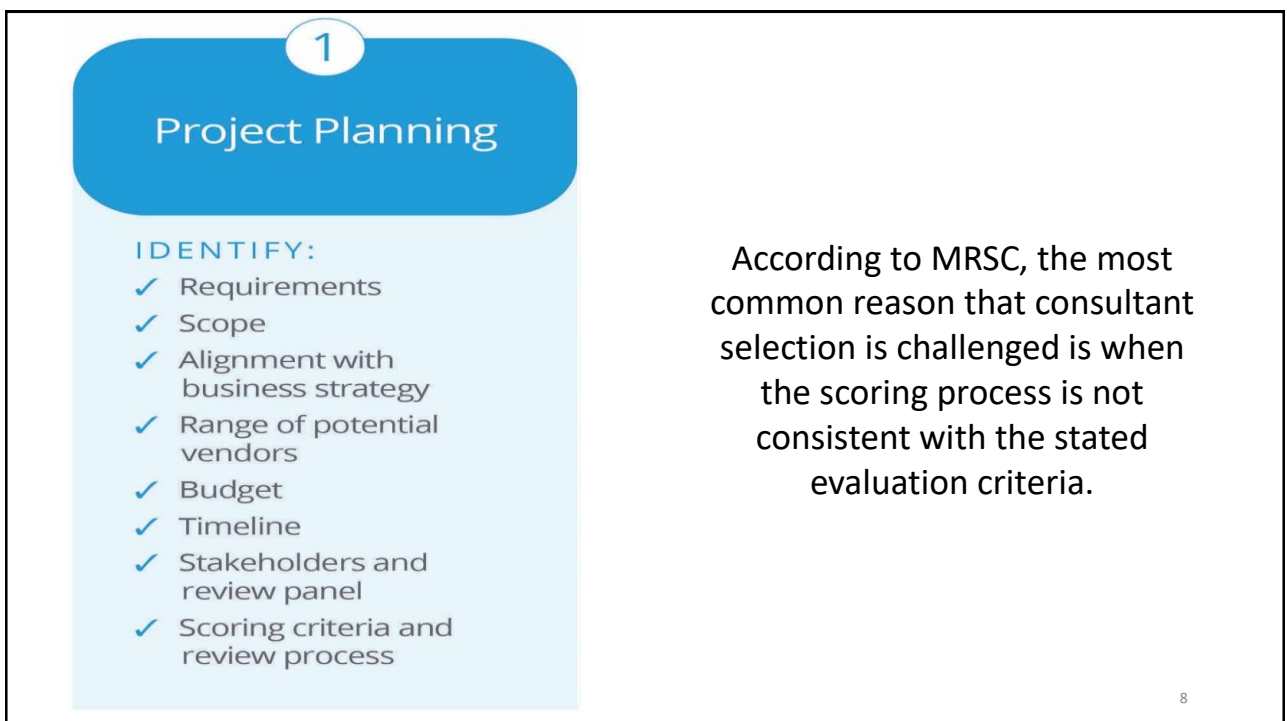
Public Agency May Consider		
Purchased Services	Personal Services	A/E Professional Services Under Chapter 39.80 RCW
Cost or Price	Qualifications and Fees or costs	Qualifications first, then price - after selection
Quality of previous performance	Quality of previous performance	Quality of previous performance
Ability to meet deadlines for contract performance	Ability to meet deadlines for contract performance	Ability to meet deadlines for contract performance
Responsiveness to solicitation requirements	Responsiveness to solicitation requirements	Responsiveness to solicitation requirements
Demonstrated compliance with employment security and sales tax requirements (all as applicable)	Compliance with statutes and rules relating to contracts or services	Compliance with statutes and rules relating to contracts or services
Ability, experience, and reputation	Ability, experience, and reputation	Ability, experience, and reputation
References	References	References
Staff readily available for the project	Staff readily available for the project	Staff readily available for the project
Financial capacity	Financial capacity	Financial capacity
Meets applicable licensing requirements	Meets applicable licensing requirements	Meets applicable licensing requirements
Safety record	Safety record	Safety record
Ability to meet necessary response times for unscheduled work and emergencies	Ability to meet necessary response times for unscheduled work and emergencies	Ability to meet necessary response times for unscheduled work and emergencies
N/A	History of Errors and Omissions	History of Errors and Omissions
N/A	N/A	Construction Change Order History

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Drafting the RFP

SECTIONS INCLUDE:

- ✓ Introduction
- ✓ Statement of purpose
- ✓ Background information
- ✓ Scope of work
- ✓ Budget
- ✓ Project schedule
- ✓ Contract terms and conditions
- ✓ RFP timeline and review process
- ✓ Requirements for proposals

The more time you allow consultants to prepare the proposal, the more likely you are to receive well thought out, relevant submittals.

MRSC suggests 3-4 weeks.

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1. Communicate Clear Expectations
2. Research the type of product you'll get with your budget
3. Request examples
4. Contact references
5. Designate an agency Project Manager/primary point of contact



1. Rush to prepare the RFP
2. Advertise unless you are ready to make the selection
3. Ask about percent availability
4. Expect unrealistic turnaround of deliverables

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6. Request regular status reporting and outcomes
7. Clearly outline timelines, communication guidelines and status reports
8. Outline roles and responsibilities
9. Allow the consultant team time to get familiar with your community and the issues



5. Be afraid to talk about money. It is a regular conversation for consultants.
6. Have selection requirements in the RFP/RFP that differ from the evaluation requirements

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10. Make the interview fun
11. Use the time to gain more insight into the team and their proposal.
12. Outline roles and responsibilities
13. Allow the consultant team time to get familiar with your community and the issues
14. Score both the written proposal and the interview when using RFP



7. Have selection requirements in the RFP/RFP that differ from the evaluation requirements
8. Ask the consultant to regurgitate their proposal during the interview
9. Fail to read the written proposal before the interview

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Viable Alternative?

1. Here is what we are trying to accomplish
2. Here are the services that we think we need to accomplish that
3. Here is the amount of money available for the task
4. Within our budget, how can you assist us with this project?
5. If the budget does not seem adequate to accomplish all that we need to do, what would be a more reasonable budget—and what additional services would you provide under that budget?

Credit: American Planning Association, Planning Advisory Service, Report Number 573 *Working With Planning Consultants*



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Questions?

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Additional Points

1. Hire someone that is both competent and you enjoy working with. The experience will be much more enjoyable.
2. Begin with the end in mind
3. Practicality and action oriented
4. Clear point of contact, preferably a trusted decision-maker.

Do you want a consultant to do the work that you can't get to or are you looking for their expertise and to provide new insight into the issue.

Hiring a consultant is a partnership and the best chance for success comes if both are working toward a common, identified goal.

That time has to go somewhere...

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- Define the request
- How will you score/evaluate proposals?
- Budget Range? Yes, please.
- When should you define the scope and tasks versus leaving that up to the consultant?
- Will you accept questions on the proposal?
- References and past projects

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