

Finding Community Planners Request for Proposals Guide

2024

Introduction

A Request for Proposals (RFP) is a tool to communicate to a consultant what you need and how quickly you need it. A well-prepared RFP should clearly outline:

- details of the project
- timelines
- responsibilities

This information will allow the consultant to provide an accurate service quote. If the RFP is clear, the proposals will include all the necessary information to decide if the consultant can meet your needs at a cost you can afford.

Developing an RFP requires some time and effort but will:

- Help the consultants to prepare proposals in response to your needs.
- Streamline the evaluation process.
- Contribute to the preparation of the Terms of Reference (TOR) and the contract.

Request for Proposals Content

To ensure that all parties' time is best spent, the RFP should include the following information:

Information About the Community

To help a consultant decide if their services fit your needs, begin your RFP with information about your community, including but not limited to:

- A brief description of your community (location, population, significant industry, development settlement).
- Identification of existing planning tools, including Official Community Plans, zoning bylaws, and Regional Growth Strategies.
- Your mission, vision, goals, and relevant growth plans.

Scope of the Project

Your project description will provide the consultant with context and identify your expectations. The better the consultant understands your requirements, the better the proposal. Clearly explain:

- Why you are seeking proposals.
- Issue(s) the project is intended to address/resolve.
- The goal of the project.
- Issue(s) which may complicate the project.
- History relating to or affecting the project.
- Other related projects.

- The interim and final products you require (if the product/project is similar to something existing, consider providing this information as an attachment).

Timelines

Indicate the overall timeline for completing the project and set milestones or deadlines. These factors may affect what a consultant proposes and the cost. If time is very important, consider including a project schedule in your RFP, or you can specifically request a workplan identifying key actions, staffing, resources, costs and timelines.

Responsibilities

To help the consultant understand the range of services required, clearly identify your expectations for administrating and managing the project and ask them to identify what they will be responsible for in the proposal. For example:

- Administration, e.g. meetings, minutes, invoicing, etc.
- Organizing public consultations, preparing/printing materials, presentations, final reports, etc.

Budgets

To help consultants decide if they wish to develop a proposal and to determine if the proposal meets the limitations of your budget:

- Clearly identify your budget for the project as appropriate.
- Request consultants respond with detailed estimates for each product or phase of the project and ask them to identify what they have allowed as a contingency factor.

Information About the Consultant

The RFP should ask for detailed information on the consultant's expertise and experience. Request a resume of the principal consultant, summaries or examples of similar work performed for other municipalities, or references from similar clients. Ask the consultant to identify any sub-contractors and what they will be responsible for, as well as verify their expertise.

To help you compare consultants, it may be helpful to prepare a questionnaire focusing on experience and expertise of particular interest to your group.

Submission Requirements

To ensure that you get the proposals complete, in an acceptable format, and on time, the RFP must provide:

- contact information
- closing date/time
- number of copies required
- any templates or forms you have developed
- acceptable formats (digital, hard copy)

The RFP should also let consultants know:

- When you will review proposals.
- Whether or not you plan to conduct interviews and reference checks.
- When you will make a decision.

Some municipalities will prepare a separate Terms of Reference (TOR) for detailed or large projects like an official community plan. Where applicable, these should be referenced in the RFP and attached.

Criteria for Proposal Evaluation

Consultants need to know how you will evaluate proposals. Clearly outline the criteria. This may be as simple as the total cost or may include several factors like:

- related experience
- proposed approach
- submitted workplan
- costs and outputs

Terms and Conditions

A section outlining any terms and conditions applying to the proposal or the overall product/project should be included at the end. For example:

The municipality will:

- Not pay for bids.
- Retain the right not to select any consultants.
- Require a contract before a certain date.

For clarity, include any definitions or terms that may be unfamiliar to the consultants.

Conclusion

Crafting a good RFP requires some time and effort. A good RFP will help the consultants prepare proposals in response to your needs, streamline the evaluation process, and contribute to preparing the TOR and the contract.

Contact Information

For more information on how to find planning professionals, visit saskatchewan.ca or the Saskatchewan Professional Planners Institute at www.sppi.ca.

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