

# Request for Proposals – Consultant/Contractor Selection

2006 AMD Conference



## Freshwater Conservation Program

Ben Wright, Assistant Director of Watershed Programs

# Why Work With Consultants?

- Expertise
- Experience
- Equipment
- Time



# Potential Pitfalls



- Costs and administrative issues
- Getting less than you bargained for
- Getting something other than expected
- Project being completed with little participation from the organization
- Disagreement on project scope of work, approach and schedule



# Keys to a Productive Client/Consultant Relationship

- Contact other local organizations for input
- Establish a project committee
- Contact several firms to determine their interest
- Prepare a Request for Proposal (RFP)
- Review and rank proposals received
- Select at least three but no more than five firms to further discuss the project
- Conduct formal interviews



# Contact Other Organizations

- Ask other area watershed organizations if they have experience with similar projects
- Arrange for a tour of a completed project that is similar to yours
- Ask to review documents that were completed as part of a project such as a watershed assessment
- Speak with partners that were involved with the project



# Establish A Project Committee



- Select a few individuals who are interested in serving
- Allow the committee to be the project managers on behalf of the organization
- Charge the committee with handling all associated administrative matters



# What is a Request for Proposal?

Document sent to a consultant or several consultants that details the desired scope of work to complete a needed project



# To RFP or Not to RFP? That is the Question

- When to complete an RFP
  - Almost always
  - You know exactly what you want
  - Expectations of the project are clear
- When to consider not completing an RFP
  - You are unsure of what is needed to complete a project
  - You have a project in mind but are unsure of how to approach it and you are unsure of funds needed to complete the project



# Typical RFP Components

- Description of your organization
- Description of the project
- Project location map(s)
- Requirements for preparing a proposal
- Detailed list of expected deliverables
- Criteria to be used in selecting the consultant



# RFP Process

- Project committee prepares the RFP
- RFP is distributed to several consultants
- Consultants submit proposals
- Project committee reviews and scores the proposals
- Project committee selects at least three and no more than five consultants to interview



## RFP Process (cont.)

- Directors of organization conduct consultant interviews
- One consultant is selected based on the evaluations of the group
- Consultant is contacted and a meeting date is established to discuss the development of a project contract
- Organization and consultant agree on a contract and an official agreement is executed



# No RFP?

- Invite selected consultants to meet with the project committee to discuss the potential project
- Ask the consultants involved to prepare a brief proposal on how they would approach the project as well as a price proposal
- Select a consultant that the project committee feels comfortable working with
- Work with the consultant to prepare a funding proposal
- Upon receiving funding, work with the consultant to prepare a project contract



# Consultant Contracts

- Always:
  - Insist that the deliverables are clearly outlined
  - Require that the procedure for payment of invoices is defined
  - Insist that your organization is continually updated on the project status
  - Spell out how your organization as well as volunteers will be involved
  - Establish a clearly defined project schedule



# Consultant Contracts (cont.)

## ■ Never:

- Accept a verbal commitment
- Allow words such as “up to” and “could include” to appear in the contract
- Let a consultant ask to locate additional funding to complete a project because of budgeting concerns
- Allow a consultant to deviate from the project schedule (within reason).



# Interactive Consultant Interviews

## ■ Scenario

Your organization has received funding to complete a watershed assessment. Several consultants have submitted proposals based on your RFP and the project committee has narrowed the selection process to three firms. One consultant doesn't show-up for the interview leaving you with two choices.



# Consultant #1

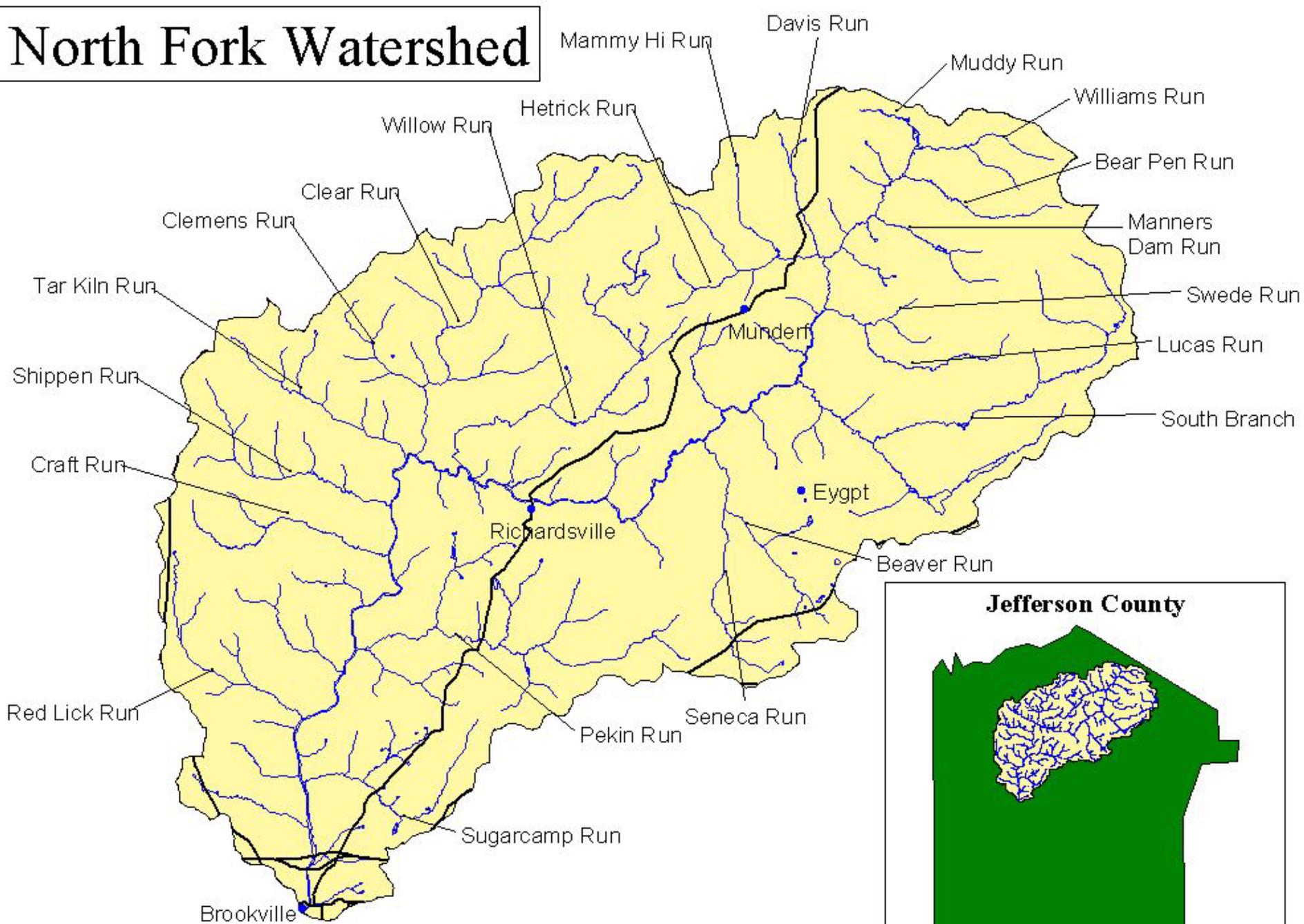
Consultant #1 has been in business for over 50 years and has a lot of experience working on all types of environmental projects. They admit that the majority of their work has been related to transportation and development projects, but they insist that a watershed assessment is something that they are equipped to complete. Their presentation approach is “low-tech” because they prefer to do business the “old-fashioned” way. They submitted a very solid proposal and the presenters appear to be confident and professional.



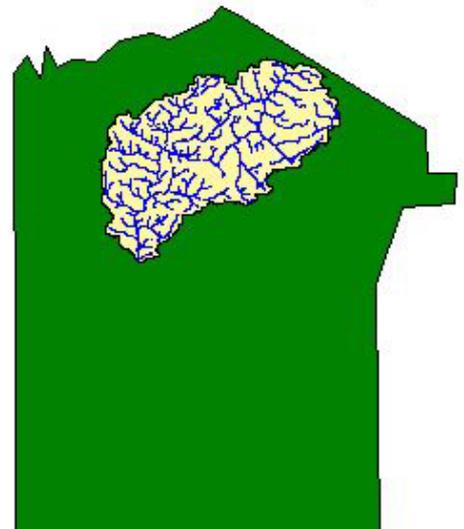
## Consultant #2

Consultant #2 has only been in business for five years. They specialize in water quality as well as biologically sensitive stream restoration designs. The majority of their work has been done in Maryland, but they have completed a few small assessments in western Pennsylvania as a sub-consultant to larger firms. Their presentation approach is “high-tech” because they are proud of their GIS ability as well as the assessment protocol they developed in-house. They submitted a very solid proposal, but the price to complete the project is about \$1,000 more than Consultant #1.

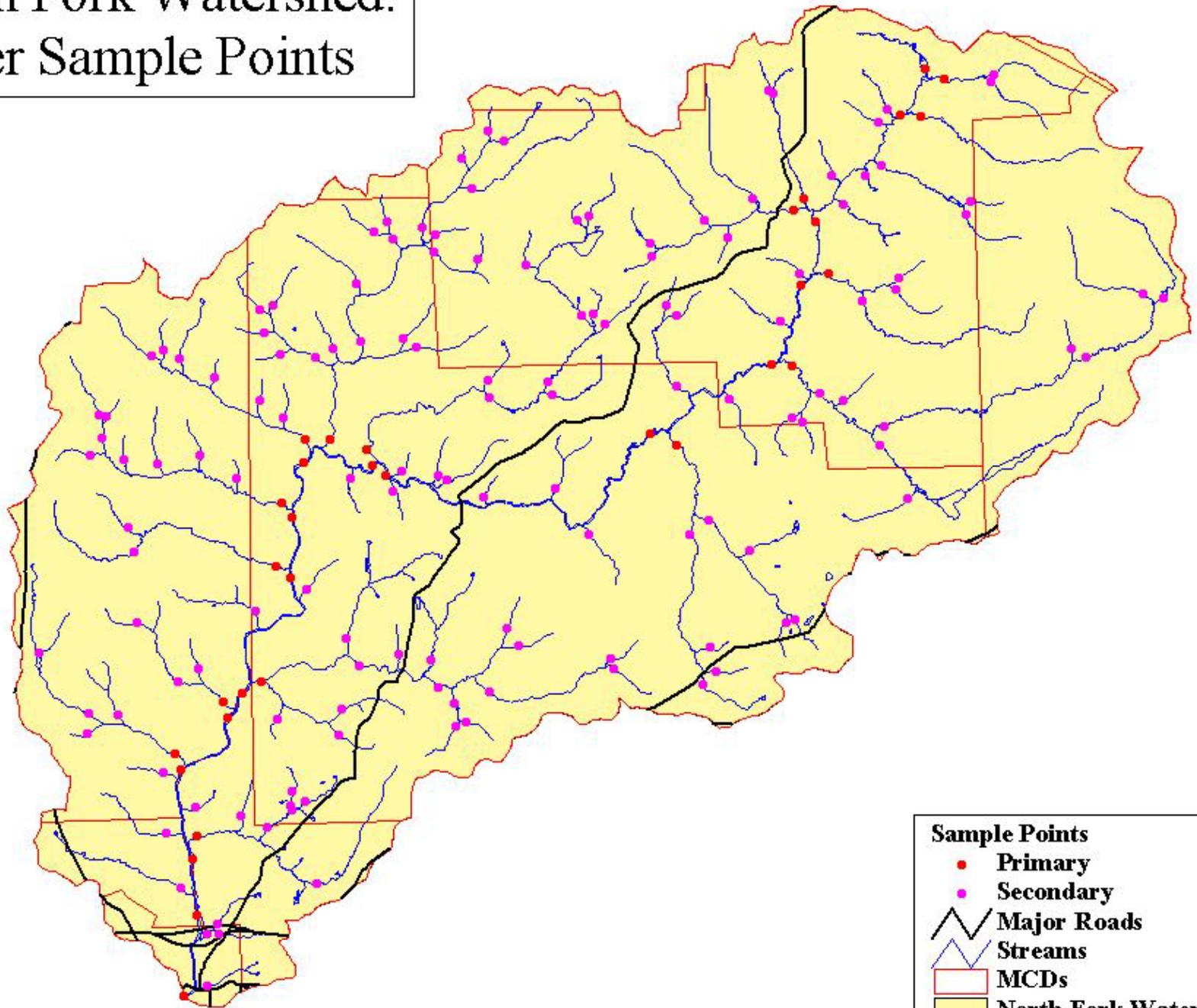
# North Fork Watershed



## Jefferson County



# North Fork Watershed: Water Sample Points





NO TRUCKS  
HOT CO

Informational display board with text and a map.













## **Mission Statement**

**We're Consultant #2  
and We're Here to  
Serve You!**



# Who Can Help?

- Freshwater Conservation Program
- County Watershed Specialist
- DEP Watershed Manager



*Saving The Places We Care About<sup>®</sup>*

**Freshwater Conservation Program**

**246 South Walnut Street**

**Blairsville, PA 15717**

**724-459-0953**

**[www.paconserve.org](http://www.paconserve.org)**