

**Village of Evendale, Ohio
Request for Qualifications
Consulting Services
July 2009**

I. Purpose of the Request

The Village of Evendale, Ohio is soliciting statements of qualifications by consultants to provide professional services for Master Plan Implementation Monitoring & Reporting, Economic Development Strategic Planning and Land Use Marketing.

II. Instructions to Responders

- a) All responses shall be delivered to:

Jack Cameron
Administrative Assistant to the Mayor
Village of Evendale
10500 Reading Road
Evendale, Ohio 45241
(513) 563-2244

Deadline for submittal is Monday, August 3, 2009 at 3:00pm.

- b) Please submit ten (10) paper copies and one (1) electronic copy on CD of your statement of qualifications in a sealed envelope clearly labeled "Statement of Qualifications for Consulting Services".
- c) Qualifications should be prepared simply and economically, providing a straight forward, concise description of provider capabilities to satisfy the requirements of the request. Emphasis should be on completeness and clarity of content.
- d) An authorized representative of the firm must provide a signed statement expressing the sincere interest and willingness to perform the duties if chosen.
- e) Any questions should be directed to Jack Cameron at (513) 563-2244 or jack.cameron@evendaleohio.org.
- f) The firm must include evidence that they maintain the following minimum insurance:
- Workers' compensation and employer's liability in amounts required by law;
 - Commercial general liability with limits not less than \$2,000,000.00;
 - Automobile liability insurance with limits not less than \$2,000,000.00; and
 - Professional liability with limits not less than \$2,000,000.00.

- g) Responders should keep requested services separate in their response and may submit for one area, two areas or all three.
- h) Responders will be provided an electronic copy of the Village of Evendale Comprehensive Master Plan and need to be familiar with the Plan to respond to this RFQ.

III. RFQ Submittal and Requested Information

Submittals should include:

- a) Introduction: provide a brief letter of introduction on firm's letterhead transmitting all RFQ information;
- b) Provide headquarter location for the firm submitting as well as permanent branch office locations and similar information for any subcontractors expected to perform work as part of your submittal.
- c) Experience: provide a profile of experiences the firm has, including firm's experience with similar projects. Include similar information for any subcontracting firm(s) to perform work on the project;
- d) References: provide information and references on public sector work relating to Master Plan Implementation Monitoring & Reporting, Economic Development Strategic Planning and Land Use Marketing;
- e) Proposed fees and costs: provide a listing of fees for members of the consulting team who would be involved in the project, including any support personnel. The Village is interested in considering lump sum pricing for the work items. Please include a statement of willingness (or unwillingness) to undertake designated tasks for a flat fee for the project, i.e. "lump sum" fee for all services.
- f) Timeframe and schedule: provide the proposed timeframe for your firm to perform the tasks. Include proposed schedule and key dates, firm's work hours anticipated for each task which should include a breakdown of hours worked on specific items and the task as a whole.

IV. Scope of Services/Tasks

The Village of Evendale is seeking qualified consultants to provide a range of potential services. Listed below are the potential services and description. The Statement of Qualifications should better explain the firm's recommended course of action for each area of service. Specific tasks will be identified and contracted out on an as-needed basis.

- a) Master Plan Implementation Monitoring & Reporting

The Village of Evendale Council recently adopted a comprehensive Master Plan. This Master Plan includes ideas and direction for the future development of the Village and action items to help see this vision through to reality. The key to having the Master Plan be effective is implementation of these action items and continued monitoring of their progress. The process

to draft and adopt the Master Plan is extremely valuable to gain consensus from all involved but the benefits are mostly realized in what happens after the plan is adopted.

With the adoption of the Master Plan there is an abundance of tasks to be completed with responsibility spread among Village staff, Planning Commission, Community Improvement Corporation and Council. These tasks/action items have suggested timeframes and priorities assigned. In order to take full advantage of the Master Plan there should be one person/body responsible for tracking progress and reporting the results on a regular basis. It should be recognized that the action items identified are suggested actions and not set in stone. A part of the Master Plan implementation and monitoring is adjustment of the plan on a 3 year basis which would include the action items.

At this time it is not defined how the tracking of these action items and associated timeframes will happen. It could be accomplished with the existing matrix in the Master Plan and updating that regularly or possibly a project tracking software such as Microsoft Project or the like.

The following are the work activities identified with the Master Plan Implementation:

- Decide body responsible for overseeing monitoring and implementation;
- Decide tracking method to be used; spreadsheet, project tracking software
- Decide reporting frequency and format;
- Develop baseline report;
- Monitor progress of action items;
- Report progress
- Report status of Master Plan progress monthly; and
- Recommend modifications to Master Plan annually or as frequent as necessary.

b) Economic Development Strategic Plan

The Village of Evendale does not have a plan in regard to economic development. It is common for an economic development organization, EDO, to draft and implement a Strategic Plan. This plan is similar to what a Master Plan does for land uses and helps the EDO prioritize and focus their efforts.

The strategic plan would engage a group of stakeholders and establish a mission statement for the EDO, goals, objectives and action items as well as an implementation plan with monitoring and adjustment allowances. The strategic plan would work in unison with the Master Plan so that economic development efforts are focused properly.

The following are the work activities associated with the Strategic Plan:

- Outline process;
- Identify key stakeholders;
- Draft mission statement;

- Draft goals and objectives;
- Draft and finalize plan;
- Implement plan; and
- Monitor/evaluate outcomes and retool/adjust plan as needed.

c) Land Use Marketing

Land marketing is identified in the Master Plan for various parcels both privately owned and also landbanked and owned by the Village. This is an area we currently do not have activities. The Master Plan identifies priorities and timeframes for various properties and areas. There are more areas and properties identified to be marketed than time and funds will allow. It will be necessary to establish a priority list within this area of work to exert a reasonable amount of effort without going overboard.

Although each area and parcel are going to be different and have different needs to market it is reasonable to assume that in order to market an area the following will have to be done:

- Develop priority list from the Master Plan;
- Identify work needed to market each area in current priority status;
- Determine funds needed to pursue marketing of each specific area;
- Prepare written specifications for each area;
- Prepare conceptual drawings for area/parcel; and
- Market area/parcel as decided.

V. Selection Process

The Village of Evendale will evaluate the responses based on the qualifications, background, experience and apparent reasonableness of the consultant's fee structure. The Village retains the right to negotiate the final proposed fee schedule prior to recommending any respondent to City Council for contract award.

The Village of Evendale will conduct a formal selection process to determine the best qualified consulting team as follows:

- a) The selection committee shall screen and rate all RFQ's submitted. Ratings shall be based on the following criteria (among others);
- Professional qualifications of the consultant and key personnel;
 - Experience on projects of similar size and scope;
 - Capability of the consultant to deliver timely and high quality services;
 - References on previous projects; and
 - Fee schedule.

- b) The selection committee will select the best qualified consultants that will be invited for interviews.
- c) The selection committee will select and rate the consultants in each category where professional services are desired.
- d) The highest rated consultant(s) will enter into contract negotiations with the Village. When services and fees have been agreed upon the selected consultant will be presented to Village Council for approval. If negotiations are not successful, then the Village will enter into negotiations with the next highest rated consultant until an agreement for services and fees can be reached.

VI. Terms and Conditions

- a) This RFQ does not commit the Village of Evendale to pay for any direct and/or indirect costs incurred in the preparation and presentation of a response. All finalists shall pay their own costs incurred in preparing for, travelling to and attending the interviews. The Village of Evendale reserves the right to accept or reject this proposal in part, or in its entirety.
- b) Consultants are advised that the Village of Evendale will only deal with the principals or their designated agents with regard to this RFQ. It is understood by the principals and their agents that the Village is not obligated to accept any proposal or to negotiate with any proposers and the Village reserves the right to accept the proposal, which in its sole opinion, will best serve the public interest. The Village reserves the right to negotiate simultaneously with more than one consultant.
- c) Any proposal may be withdrawn up until the date and time set above for submitting the RFQ. Any proposal not so timely withdrawn shall constitute an irrevocable offer, for a period of ninety (90) days to provide to the Village the services described, or until one or more of the proposals have been approved by the Village, whichever comes first.
- d) Payment by the Village for the services will only be made after the services have been performed; an itemized billing statement is submitted and approved by the Village, which shall specifically set forth the services performed, the name of the person performing such services, and the hourly rate charge for such person. Payment shall be made on a monthly basis, no later than thirty (30) days after approving such billing statement.