



Selecting Consultants and the RFP Process

Sponsored by EPA Region 4

Presented by Stephanie Shakofsky
and Ignacio Dayrit, CCLR

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How to Use This Presentation

- Call-in to 1.866.299.3188 and enter access code 4045628660#
- Follow along with the slides during the presentation – we will tell you when to go to the next slide

Agenda

- Introductions
- EPA Grant Award: First Steps
- Request for Proposals (RFPs) vs. Request for Qualifications (RFQs)
- EPA Requirements for Procurement
- Local Requirements for Procurement
- RFP/RFQ Contents & Issuance
- Interviews, Scoring, and Selection Process
- Contractor Awards
- FAQs

Introduction

Center for Creative Land Recycling (CCLR)

- Workshops
 - Brownfield Redevelopment & Project Financing
- EPA's technical assistance provider for Region 4
 - Program and project implementation
 - Grant review
 - Outreach & Education
- Find us at www.cclr.org or 415.398.1080



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EPA Grant Award: First Steps

- Grant documents and work plan
 - Often best to wait for EPA approval prior to issuing your requests
- Pulling your request together
 - Understanding the goals and objectives of your project
 - Assembling your internal team and your community partners
 - Request for Proposal (RFP) or Request for Qualifications (RFQ)?

RFPs versus RFQs

- Request for Proposals (RFP)
 - The RFP spells out the requirements for a proposal that address a very specific task or tasks
 - The consultant is asked to submit a work plan for the tasks, a cost estimate for each task, & related experience
 - Good for comparison shopping your project
 - Best for very specific project work (site specific cleanup)
- Request for Qualifications (RFQ)
 - The RFQ involves inviting consultants to submit their qualifications to perform specific tasks
 - Consultants are asked to submit their company's qualifications (key staff, past experience, clients, & references) and their hourly/salary rate schedule
 - Best for less specific projects (site assessments)

EPA Requirements for Procurement*

- Many EPA Requirements for contracting—but manageable! A list of the more important:
 - Use your own procurement procedures (provided they conform to federal law)
 - Must be a publicized, full, and open competitive process
 - Must have an established method for evaluation
 - Must analyze cost—but DO NOT have to award to lowest bidder

* Someone on your team should be familiar with 40 CFR Part 30 & 31

Local Requirements for Procurement

- Any local or state procurement requirements?
- Make sure they don't conflict with federal laws (for example: local hire preferences)
 - Good to consult with your city attorney or purchasing department, some typical local procurement requirements:
 - Advertising and posting requirements
 - Equal Benefits Ordinances

RFP/RFQ Contents

- Include project description, work plan, schedules, and projected budget (*more detail needed for RFPs*)
- Good to include EPA contracting requirements, cross cutters, and Davis Bacon Act* (include your grant Terms & Conditions as addendum)
- Proposers must meet EPA definition of “environmental professional”
- Include City or state contracting requirements
- Must define the selection and rating process
- Submittal requirements: page/font limits, electronic or paper, deadlines, & required information

* Davis Bacon is generally not required for Assessment grants because they do not involve construction or repair

After Issuance and Before Submittal

- Answering questions from prospective consultants
 - Communicating by email is recommended
 - Good to ask everyone intending to submit to provide their email contact so you can respond and clarify by email to everyone
- Pre-submittal conference meeting/call, good idea?
- Internal activities
 - Select scoring and interview (if any) panels
 - Community development? Environmental Dept? Public Works?
 - Design your scoring sheet and questions

After Submittal

- Schedule interviews?
 - Not required but strongly suggested—best way to get sense of “chemistry” and you can learn a lot!
- Good idea to have the selection team review all proposals separately prior to interviews
- Scoring of proposals by each selection team member can be done during and/or after the interview process
- Selection team should meet shortly after reviews or interviews to finalize selection process
- Address protests, if any

Evaluating/Rating the Proposals

- Does the proposer have the relevant experience for your project? Experience with similar type grants?
- Does the proposer show an understanding of your project/program/community?
- If provided, how reasonable are the hours assigned for project personnel?
- How do the billing rates and schedule of fees compare with other proposals?
- Did the proposer “read between the lines” and provide additional information?

The Award

- Must document selection process
- Coordinate schedule and deliverables with reporting requirements
- Noticing and memorandum, if any

FAQs

- Can we use a consulting firm we already have under contract without going through the procurement process?
- A consulting firm worked with us to write our successful grant application, can we award the contract to that firm without going through the procurement process?
- What process should be followed if only one response to the RFP/RFQ is received?
- Is there a maximum salary/hourly rate for contractors?

Resources

- Example Documents
 - RFP: <http://cclr.org/media/publications/Sample%20RFP.docx>
 - RFQ: <http://cclr.org/media/publications/Sample%20RFQ.docx>
 - Scoring Sheet:
<http://cclr.org/media/publications/Scoring%20Sheet.xlsx>
- CCLR Contact Info
 - Stephanie Shakofsky
 - 415.398.1080 x110
 - stephanie.shakofsky@cclr.org
 - Ignacio Dayrit
 - 415.398.1080 x107
 - ignacio.dayrit@cclr.org