

REQUEST FOR PROPOSAL/QUALIFICATIONS (RFP/Q)
THURSTON REGIONAL PLANNING COUNCIL – BIENNIAL RETREAT FACILITATION
Thurston Regional Planning Council

PURPOSE

The Thurston Regional Planning Council (TRPC) seeks proposals for facilitating the Council's biennial retreat in July 2021 (specific date to be scheduled with successful firm), including necessary preparatory and follow-up work.

BACKGROUND

TRPC is a 23-member council of governments that fosters the Thurston region's livability through collaborative, informed planning. It carries out regionally focused plans and studies on topics such as transportation, growth management, and environmental quality. TRPC meets monthly to address opportunities and challenges related to the region's growth. Through TRPC's staff, it also provides information and education regarding the region and its emerging planning issues. Regional statistics, trends, analyses, modeling, and maps provide a basis for planning and decision-making on both the regional and local levels. A variety of council-sponsored community forums relating to regional planning help to educate and promote public participation and dialogue.

TRPC holds a retreat every two years to better define and focus TRPC's work. At the retreat in 2017, TRPC developed the agency's first formal strategic plan. At the 2019 retreat, TRPC further updated and broadened the strategic plan. Given the considerable changes over the past year as the Thurston Region responded to the public health crisis, TRPC intends to take a step back from the strategic plan at this retreat. TRPC aims to revisit the core values around its work, mission, and what can be better accomplished by working regionally – with a specific emphasis on how TRPC can help the region recover from pandemic response.

SCOPE OF WORK

The basic scope of work is for a facilitator

- To prepare TRPC's 23-member Council for the retreat.
- Facilitate the retreat itself (roughly 8:30 am to 4:00 pm in July 2021).
- Prepare summary and follow-up materials.

As TRPC is seeking a retreat format that is different than past retreats, this scope of work focuses on the outcomes that TRPC wishes to achieve through the retreat. We seek proposals that suggest how the facilitator would structure any pre-retreat work, the day of the retreat, and post-retreat materials to achieve the desired outcomes.

The basic outcomes TRPC wishes to achieve are:

- Identification of the values of Council members in relation to the organization's core charge of transportation, land use, and environmental planning at a regional scale across individual jurisdictional boundaries. (e.g., potential transportation values – quality: consistent transportation quality across the region, resilience: ability to recover from traffic, natural, or other incidents). TRPC seeks to identify the values of its members and identify if some values are more important than others.

- Based on those values: reestablish the mission for the organization.
- Based on the values and mission, define goals for our work (time permitting)
- Considering the work of the day, identify opportunities for this organization to support recovery from COVID response.

Given the desired outcomes, TRPC seeks proposals that answer the following questions:

1. TRPC is a diverse, 23-member organization and stepping back to the discussion of values and mission can be challenging. What pre-retreat work would you propose to help ensure that each participant is prepared to fully engage in a discussion of values, mission, and goals? At a minimum the TRPC Retreat Subcommittee plans to meet with the successful vendor for two, 1.5-hour retreat planning meetings, the first on May 7 and the second on June 4.
2. At the retreat itself, being only a 6-7 hour timeframe for the work, how would you propose structuring the day to achieve the outcomes? What order of items and what specific facilitation techniques would your firm employ to maximize the likelihood of achieving the desired outcomes?
3. Ultimately, TRPC intends to define goals for the work of the organization in support of the mission and in alignment with the identified values. Given the time constraints of the day, how would your firm propose to address goals or would you propose that defining goals not be part of the one-day retreat?
4. Like everywhere around the globe, the Thurston Region has changed substantially over the past year in response to the COVID pandemic. TRPC wishes to spend time in the afternoon discussing the impacts of COVID response to the region and how the mission of TRPC could be used to help in the region's recovery. How would your firm propose transitioning the group from a discussion of values, mission, and potentially goals into a discussion of how TRPC can support COVID recovery?
5. It is important to TRPC that the results of the retreat are compiled in a manner that provides a foundation to work from to continue to flesh out the organization's strategic priorities. How would your firm propose to compile and document the results of the retreat?
6. Due to the ongoing need for social distance, yet the progress being made in vaccination, TRPC wishes to remain nimble in regards to the retreat being held in person, a hybrid of in person and remote participation, or completely remote. When preparing a proposal, TRPC would like firms to outline their approach to the three meeting alternatives and whether the firm believes given what we know today, whether one approach is preferred over the others.

COMPENSATION

- A. Proposals are to fully detail the scope and budget assumptions the vendor makes in its proposal. Upon selection of the most qualified vendor based on qualifications, the proposal, and cost assumptions TRPC will negotiate a detailed scope of work final price which it determines is fair and reasonable. If TRPC is unable to negotiate a satisfactory contract with the vendor selected, negotiations with that vendor will terminate and TRPC may select another vendor.
- B. Payment by TRPC for the services will only be made after the services have been performed. An itemized billing statement is required to be submitted in the form specified by TRPC and approved by the appropriate TRPC representative, which shall specifically set forth (1) the services performed, (2) the name of the person performing such services, and the (3) hourly labor charge rate for such person. Payment shall be made monthly, within thirty (30) days of receipt of such billing statement.

PROJECT TIMELINE

Recruitment will occur during spring 2021, with an anticipated selection date by late April and a project start date in May.

The anticipated dates for key actions are listed below:

Issue RFP/Q:.....	March 19, 2021
Proposal and Qualifications Due:.....	April 6, 2021, 4:00 p.m. PDT
Interview Notification (if necessary):	April 12, 2021
Interviews Conducted (if necessary):.....	April 15-16, 2021
Contract Negotiations Begin:	April 19, 2021
Consultant Services Begin:	May 7, 2021

SUBMITTAL REQUIREMENTS

A. Instructions to Proposers

- Submittals must be limited to six (6) double-sided pages (12 total faces), plus a cover page.
- Please send an electronic copy of the proposal in PDF format to Veena Tabbutt, tabbutv@trpc.org. Paper copies will not be required due to limited office access during the COVID-19 pandemic.
- All responses must be received by **April 6, 2021, at 4:00 p.m. PDT.**
- Responses should be prepared simply and economically, providing a straight-forward, concise description of provider capabilities and proposal to satisfy the requirements of the request. Colored displays, promotional materials, etc. are not allowed.
- Any questions concerning the RFQ's specifications or process shall be directed in writing to Veena Tabbutt, Deputy Director, at tabbutv@trpc.org before March 31, 2021. Responses to questions and/or any changes to this RFP/Q during the period of advertisement will be posted on the TRPC website (www.trpc.org).

B. Contents:

All RFP/Q responses must include the following information:

- Name, address, and telephone number of the firm or individual and the primary contact.
- Brief description of the organization and its background, size, and nature of services.
- Names of principals and key personnel who would work on the project and their experience and qualifications.
- Availability of personnel who would be dedicated to the project.
- Experience working with similar projects.
- List of at least three project references, including contact persons and phone numbers.
- Suggested scope of work and deliverables, specifically addressing the following questions:
 1. What pre-retreat work would you propose to help ensure that each participant is prepared to fully engage in a discussion of values, mission, and goals?

2. How would you structure the day to achieve the outcomes? What order of items and what specific facilitation techniques would your firm employ to maximize the likelihood of achieving the desired outcomes?
 3. How would your firm propose that specific goals in support of the mission are addressed during the retreat or would you propose that defining goals not be part of the one-day retreat?
 4. How would your firm propose transitioning the group from a discussion of values, mission, and goals (if proposed) into a discussion of how TRPC can support COVID recovery? What specific facilitation techniques would you use for this portion of the retreat?
 5. How would your firm propose to compile and document the results of the retreat?
 6. How would you set up the retreat if it were held entirely in person? A hybrid of in person and remote participants? Completely remote? Given what we know today, do you suggest one of these alternatives over the others?
- Please provide a draft agenda for the day – beginning at 8:30 am and ending at 4:00 pm.
 - Proposed budget detailing hours by staff person separated into 1) pre-retreat work, 2) day of the retreat, and 3) post retreat work.

C. Any changes to this RFP/Q during the advertisement period will be posted online at www.trpc.org.

SELECTION PROCESS

A selection committee comprised of the TRPC Retreat Subcommittee and TRPC staff will begin review of proposals on April 7. If deemed necessary, the committee will develop a short list of firms to invite for an interview. TRPC will notify firms of the outcome of this process. Proposals will be evaluated as follows:

Criteria for Selection for Interview	Weight Given
Key personnel and experience with similar projects.	20%
Scope of work and deliverables.	50%
Budget.	30%
Total Criteria Weight	100%

Each proposal will be independently evaluated on the above factors. Minority and women-owned firms are encouraged to apply.

TERMS AND CONDITIONS

- A. TRPC reserves the right to reject any and all SOQs, and to waive minor irregularities in any SOQ.
- B. TRPC reserves the right to request clarification of information submitted, and to request additional information from any contractor or vendor.
- C. TRPC reserves the right to award any contract to the next most qualified contractor or vendor, if the successful contractor or vendor does not execute a contract within thirty (30) days after selection.
- D. Any SOQ may be withdrawn up until the date and time set forth above for opening of SOQs. Any SOQ not so timely withdrawn shall constitute an irrevocable offer, for a period of ninety (90) days to provide TRPC the services described in the attached specifications, or until one or more of the SOQs have been approved by TRPC, whichever occurs first.

- E. TRPC reserves the right to reject any proposed agreement or contract that does not conform to the specifications contained in this RFQ, and which is not approved by TRPC.
- F. The Recipient, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively ensure that in any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 23 will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award.
- G. TRPC shall not be responsible for any costs incurred by the contractor or vendor in preparing, submitting, or presenting its SOQ.

POST-CLOSING DISCUSSION

After any of the responses are open, conversations may only take place between TRPC and respondents for the purposes of clarification regarding the selection process. Respondents shall be bound by the information submitted in their SOQs and subsequent negotiations.

Those submitting SOQs may be required to make a presentation to TRPC and partners as part of the selection process. The presentation team should include the Project Manager and any other key personnel necessary to address administrative and technical issues.

PROPOSAL ACCEPTANCE / REJECTION

TRPC reserves the right to accept or reject any or all SOQs received from this RFQ, or to negotiate separately with any respondent, and to waive any informalities, defects, or irregularities in any SOQ, or to accept that SOQ which, in the judgment of the proper officials, is in the best interest of TRPC.

AWARD

TRPC reserves the right to award the contract to a consultant that they deem to offer the best overall SOQ. TRPC has the discretion and reserves the right to cancel this RFQ, to reject any and all SOQs, to waive any and all irregularities, or to re-advertise with either the identical or revised specifications if it is deemed to be in the best interest of TRPC.

ASSIGNMENT

The awarded contractor shall not assign, transfer, convey, sublet, or otherwise dispose of any award or of any of its rights, title, or interests therein, without the prior written consent of TRPC.

ADDITIONAL LANGUAGE

TRPC reserves the right to introduce additional terms and conditions at the time the final contract is negotiated. Any additional terms or conditions would be limited to ones having the effect of clarifying the RFQ language and/or correcting defects, such as omissions or misstatements, which are discovered after the RFQ is issued, or that reflect State or Federal Law changes, or as required by funding entities.