



October 12th 2018

Request for Proposals (RFP) –Growth Policy Update
City of Helena, Montana
Community Development Department – Planning
Division

Issue Date:	October 12 th 2018
Title :	City of Helena Growth Policy Update
RFP Start Date:	December 17 th 2018
RFP End Date:	November 4 th 2019
Target Public Hearing Date	Planning Board: September 16 th 2019
	City Commission: October 7 th 2019
Budget	Not to exceed \$75,000
City Staff Contact:	Michael McConnell – (406) 447-8492, mmcconnell@helenamt.gov

1. NOTICE:

Notice is hereby given that the City of Helena, Montana is seeking proposals from consultants qualified to provide professional services for the update of the City’s Growth Policy document (Comprehensive Plan) that will meet and exceed the statutory requirements outlined in Section 76-1-601, Montana Codes Annotated.

The selected consultant will work in close collaboration with City of Helena staff to develop this detailed policy document. The specific scope of work and deliverables expected are discussed in a forthcoming section.

All proposals must be in the format specified within this RFP; a hardcopy must be submitted in a sealed envelope and clearly labeled with the RFP title, company name, and contact person. An electronic copy of the proposal must also be included with the submission.

Proposals must be delivered no later than November 13th 2018 at 5pm. As late submittals will not be accepted, it is the sole responsibility of the proposing consultant to ensure that the proposal was received by City staff. Once submitted, city staff along with various city board members will conduct a thorough review of each submittal and will inform the top candidate(s) who will come in for a formal interview regarding the consultants’ proposal.

Mailing address:

316 North Park Avenue, Room 402
Helena, MT 59623
Attn: Michael McConnell

NON DISCRIMINATION

The City of Helena is an Equal Opportunity Employer. Discrimination in the performance of any agreement under this RFP on the basis of race, color, religion, creed, sex, age, marital status, national origin, or actual or perceived sexual orientation, gender identity or disability is prohibited. This prohibition shall apply to the hiring and treatment of the selected entity's employees and to all subcontractors as applicable to this process.

Please include, as part of the submittal, a statement addressing nondiscrimination based on the above criteria and also note that any contract awarded will contain such a provision.

2. BACKGROUND

The City of Helena (Pop. Approx. 31,000) is seeking to update its Growth Policy, last updated in 2011, to reflect current economic, demographic, cultural and environmental trends. The Montana Codes Annotated outlines the topics that must be covered within a community's growth policy though it is the goal of the city to provide a more comprehensive document to better guide growth within and around the city limits.

3. PROJECT LOCATION

The proposed project area is the City of Helena, Montana and some immediate surrounding areas. This is based on a number of factors including but not limited to the City's Urban Standards Boundary, City zoning, County land use designations and the City's infrastructure and transportation plans. The project area could be subject to change during the execution of this RFP.

4. SCOPE OF SERVICES

a. Growth Policy Contents

The final version of the growth policy must meet the standards set forth in M.C.A 76-01-601 and must include those elements that have been determined through the public engagement process. There can be some leeway in how the selected consultant goes about covering each section according to City priorities and goals. As this is an update as opposed to a full re-write, some sections of the current growth policy document might be eliminated, moved or combined.

In addition to the sections outlined in M.C.A 76-01-601 the following topics should be covered in detail. While some of the topics below can be standalone sections, most can be fit into existing chapters. This list might expand or contract based on the community input process.

- Business Support & Development
- Financing Tools for Implementation
- Affordable Housing – creation and retention strategies
- Regulatory Framework Review
- How the growth policy assists with implementing other city plans/projects
- Gateways/Entryways

- Homelessness & Prevention
- Annexation Strategies
- Environmental Impacts
- Regional Policy Considerations
- Multimodal Connectivity
- Development Constraints

To go with each section of the growth policy it is expected that a set of goals and outcomes will be established and accompanied by a specific policy or policies to be implemented once the adoption of the growth policy document is achieved and a potential implementation timeline.

The City maintains substantial data down to the parcel level and will provide all maps and data sets needed throughout this process through the cities GIS department. The City will also provide the selected consultant with copies of all relevant plans as needed including any neighborhood plans, infrastructure and transportation plans and what other materials as is available upon request. These could include but are not limited to.

- 2011 Growth Policy
- Long Range Transportation Plan 2014 Update
- Water Facilities Plan 2005 Update
- Parks & Open Space Master Plan
- Wastewater Collection System 2008 Update
- Downtown Neighborhood Plan
- Capital Improvement Plan
- Disaster & Emergency Response Plan
- Wildland Urban Interface
- Railroad Urban Renewal Plan

b. Consultant Responsibilities:

As part of this process the selected consultant will be expected to provide certain documents and provide support and consultation to City staff in the following ways.

- Provide draft versions and final Growth Policy document creation
- Data Gathering including but not limited to demographics, economic,
- Provide strategy for soliciting community input
- Public engagement process meetings (detailed below)
- Development of goals and objectives
- Ensuring integration with other City plans and policies
- Criteria for development of future neighborhood plans
- Proposed neighborhood plan locations
- Assistance with implementation strategies

Anticipated Meetings:

There will be meetings with city staff, elected or appointed officials, stakeholders and the general public that the selected consultant will be required to attend and in most cases facilitate. In some cases two (2) or more of these meetings may be combined into a single day in order to save on travel costs. A list of required meetings is below. Final number of meetings will be determined once the process for the growth policy update has been decided.

1. Initial meeting with City Staff to discuss project methodology
2. Introductory meeting with Planning Board to discuss goals and process
3. Presentation of Final document to Planning Board & City Commission
4. Public Engagement Meetings
 - a. Neighborhood/community Meetings – 3
 - b. Working Group – 1 per month (Staff Responsibility)
 - c. Focus Group – At least 2 per group, 10 minimum (Staff Responsibility)
 - d. Work Sessions:
 - i. Planning Board – 6 (maximum)
 - ii. City Commission – 3 (Maximum)

Public Engagement Process

As a City, Helena is committed to an inclusive and transparent planning process with input from a wide range of sources. To achieve this, a robust public engagement process should be at the forefront of the planning process. Engagement with the public at large should be the foundation of this growth policy update and we hope to achieve a wide range of input and ideas from the public. Public meetings and brainstorming sessions as outlined above will be held to generate ideas as well as goals for this process. Equally as important will be engagement with the public and nonprofit sectors as well as the business community. A working group will be formed from among these three groups to better inform the process.

As part of the public engagement effort city staff will set up groups for the brainstorming and facilitation of the growth policy update document. The working group will be made up of the key governmental and institutional drivers and will guide the effort by providing institutional support for the main initiatives involved with this update. In addition to the working group there will be several focus groups that will have specific areas of influence such as housing, the economy and recreation. These groups will be made up mainly of members of the nonprofit and private sector as well as private citizens. It will be the responsibility of city staff and volunteers to meet and facilitate these groups and to provide the selected consultant with needed information for inclusion in the draft and final documents. The consultant will work with city staff to formulate meeting materials and facilitation methods but will not be required to attend these meetings.

5. Project Deliverables

Three (3) hard copies and 1 digital copy of all preliminary and final drafts of reports and the growth policy document shall be provided to the City of Helena. All documents shall be delivered to the City at least 15 working days before any public hearings or meetings with Helena City officials. Upon conclusion of this contract all data and working documents will be delivered to the City of Helena in Microsoft Word, Adobe PDF or .mxd file formats via either a CD or USB memory drive.

All documents delivered to the City of Helena must comply with the Americans for Disability Act. Documents that will be posted online shall be screen reader friendly with the most recent WCAG guidelines.

6. Progress Updates

The selected consultant will be expected to submit progress reports to city staff monthly throughout the process. These reports should detail recent work completed, upcoming tasks and deadlines, upcoming meetings and any issues that have arisen that might impact project scope or timeline.

7. Request for Proposal submittal requirements

- a. Submit 1 hard copy and 1 digital copy of the complete submittal to the city contact person listed above. These must be in a sealed envelope and can either be sent via certified mail or hand delivered. If hand delivered the envelope must be stamped "received" by city staff.
- b. Make sure to mark the outside of the envelope with the companies name and "City of Helena Growth Policy Update".
- c. All proposals must be signed by someone authorized to bind the consultant to the project.
- d. Submittals must be received by city staff no later than November 13th 2018 at 5:00PM Mountain Standard Time.

8. Proposal Outline and Contents

- Cover Page (1 Page)
 - Table of Contents (1 Page)
- Statement of nondiscrimination.
- Project Summary (not to exceed 4 pages)
 - The general process and methodology that will be used
 - General schedule of the project
 - Outline of Services provided
 - Describe to the city how the scope of work will be achieved

- Major Tasks Outline (1 Page)
 - Break down the projects major phases with a timeline for each; include anticipated hours for each phase by project team member
- Company Description (not to exceed 3 pages)
 - Include a brief history of the company and highlight the relevant work experiences. Currently underway projects can be included. Also, describe experience managing projects and processes of this scope and size
- Project Team (not to exceed 3 pages)
 - A list of company employees assigned to this project, credentials for each and relevant work experiences
 - Work areas for each project team member
- References (Not to exceed 2 pages)
 - Submit a minimum of 3 references and a maximum of 6 from governmental entities to include municipal, county or state or Tribal Governments.
 - Name of Entity/Agency
 - Contact name, title, phone number and email
 - Project name, start/end dates
 - Summary of project
- Total Costs and Expenses
 - Should be in the form of a spreadsheet with total costs for the entire scope of work and services performed. Include printing, travel, and staff time etc. Also include a requested payment schedule.
 - If a price cannot be successfully negotiated the city reserves the right to terminate negotiations and begin working with the next most qualified consultant

9. RFP Process Schedule

Publication of RFP	October 12 th 2018
Last day to Submit Proposal	November 13 th 2018
Evaluation Start	November 14 th 2018
Notify Consultant of Interviews	November 16 th 2018
Interview of Top Consultant(s)	November 26 th – November 30 th 2018
Evaluation End – Notification of Selected Consultant	December 3 rd 2018
Negotiation of Contract	December 4 th – December 14 th 2018
RFP Begin Date	December 17 th 2018

10. Selection Criteria & Scoring

A committee made up of city staff, elected as well as appointed officials will review all proposals and score them based on the following criteria. Submittals that do not meet the requirements set forth in this RFP will not be considered. Once scoring has been completed, city staff will contact the finalists to arrange interviews.

Personnel Qualifications	25 maximum
Organizational Capacity	15 maximum
Related Experience	20 maximum
Quality of Proposal	20 maximum
Local Knowledge	15 maximum
Present and Projected Workload	5 maximum
Proposal Total Score	100 Points maximum

11. Project Schedule & Timeline

Once a consultant has been selected and a contract negotiated the anticipated project timeline is 12 months to create a draft ready to be presented at public hearing. Changes are anticipated based on the public hearings required for this document and the consultant will be responsible for incorporating those changes into the final document. The project timeline outlined within this RFP is from consultant selection to the adoption of the growth policy. The city anticipates going to public hearing for the Planning Board in August 2019 and City Commission in September 2019 with final approval no later than October 2019.