

Most Municipal Planning Grant (MPG) projects start with hiring a qualified consultant. Rules for consultant selection are detailed in [Attachment D of your FY19 Grant Agreement – Procurement Procedures](#). These are designed to ensure that public funds are used to hire the most qualified people available. Here are answers to the most commonly asked questions about hiring expert assistance.

1. Is a competitive process required to select the consultant?

NO – You can skip the selection process and proceed directly to contracting if:

- Your regional planning commission is the consultant and the contract is \$10,000 or less
- Your project is part of a multi-stage project and the consultant will be continuing from a previous stage

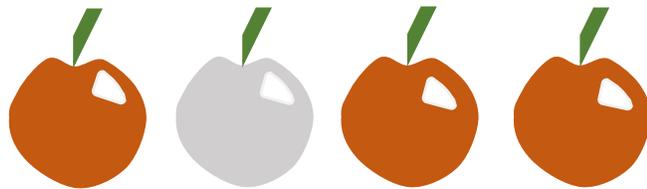
YES – You must follow the steps for competitive selection below for all other situations

Other exceptions and waiver provisions are detailed in the [Procurement Procedures](#).

2. Do we always have to issue an RFP or RFQ (Request for Proposals or Qualifications)?

NO – If the total payment for the consultant will be \$10,000 or less you can just contact two or more consultants directly to obtain price quotes.

YES – If the total payment for the consultant selection will be more than \$10,000 then you need to issue a broadly publicized RFP or RFQ. Publication in a newspaper is not required but every effort should be made to reach out to as many qualified professionals working in Vermont as possible. DHCD maintains an [Outreach List](#) and [Consultant Directory](#) that can be used to contact consultants directly, but the lists are not comprehensive so other avenues should be pursued as well.



In all situations, keep records in your files, documenting how the consultant selection decision was made. (This information is not required for MPG close-out but should be kept with the grant files for the possibility of a future audit.)

3. Should we use an RFP or an RFQ?

For MPGs **we generally recommend that municipalities use the more flexible RFQ process rather than the RFP.**

Simple templates for a [Request for Proposals \(RFP\)](#) and [Request for Qualifications \(RFQ\)](#) can be found on the MPG [Grant Administrators webpage](#) along with a [Directory of Planning Consultants](#) and an [Outreach List](#) for publicizing your RFP or RFQ.

The main difference between these two approaches for soliciting consultants is that an RFP requires the consultant to describe their approach to the project with a detailed scope of services, schedule and budget as part of their *initial* submission. The municipality reviews and compares the proposals and once the best candidate is selected, generally moves directly to contracting.

RFPs are preferred in these situations:

- When cost comparisons are a primary consideration in selection
- When the municipal group conducting the selection process does not have time for the RFQ process

RFQs are preferred in these situations:

- When the amount available to pay the consultant is a lump sum, like a total grant amount, that cannot be exceeded
- When there is a limited pool of consultants and the initial goal is to determine if any qualified consultants are interested in the work
- When negotiation on the work plan, schedule and budget are desirable prior to contracting

An RFQ selection process usually includes the following steps:

1. **Prepare a project work plan.** This is likely to be the work plan you submit as part of the Municipal Planning Grant application.
2. **Form a consultant selection committee.** This usually involves representatives of the boards and commissions involved in the project and any relevant town staff.
3. **Prepare an RFQ.** You can use this [template](#) and adapt it for your particular situation.
4. **Issue the RFQ via email,** sending it to professionals that perform the kind of work you need. DHCD maintains a [Consultant Directory](#) that can be used to contact consultants directly. Additionally, it is good practice to publicize the RFQ more broadly through some or all of [these outlets](#) – the first two sources reach consultants who regularly work in Vermont.
5. **Score and rank the qualifications that are submitted.** Use the evaluation factors you included in the RFQ (see page 3 in the template) to score the qualifications you receive and decide which candidates are best qualified to meet your needs. Usually 2-3 of the top ranked consultant teams are selected for the next steps.
6. **Interview the top candidates.** In addition to helping you determine which candidate to choose, interviews offer valuable opportunities for municipal officials to talk with different experts about ways to approach the project.
7. **Select consultant.** Document the selection process so you can easily justify the hiring decision during an audit or if the decision becomes controversial. Proceed to preparing [a contract](#) after agreeing to a detailed work plan and budget with the consultant.

When the consultant is selected:

A [written contract](#) between the town and the consultant is required for all services costing more than \$1,000. For provisions to include in the contract, see the *Procurement Procedures*, Section II on *Personal Services Contracts* and Section VI on *Standard State Requirement of Bidders* for provisions to include in the contract.

Then get started! Remember that the most successful planning projects are those that involve not just experts but that actively engage the public and all local boards and commissions.

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