



MEMORANDUM

DATE: September 26, 2011

TO: Operations Subcommittee Members

FROM: Program Staff

SUBJECT: Consultant Selection for the Sustainable Communities Planning Grant

Introduction

On June 16 2009, the U.S. Department of Housing and Urban Development (HUD), the U.S. Department of Transportation (DOT), and the U.S. Environmental Protection Agency (EPA) announced an interagency partnership to coordinate federal housing, environmental protection, and transportation planning and investment. Federal funding to support this joint venture was included in 2010-11 Fiscal Year Federal Budget of HUD's Sustainable Communities Initiative (SCI) Grants Program, in the amount of \$150 million. This initial start-up funding was provided for, among other efforts, **multi-jurisdictional regional planning endeavors**.

In order to coordinate and align federal investments to support regions with a common vision/plan for economic diversification, job creation and prosperity, the three agencies established **six livability principles** as guidance for evaluation of existing regional plans and SCI funding applications.

- Provide more transportation choices.
- Promote equitable, affordable housing.
- Enhance economic competitiveness.
- Support existing communities.
- Coordinate and leverage federal policies and investment.
- Value communities and neighborhoods

Overview

These livability principles or goals embedded in the SCI's planning grant program are consistent with Council's Strategic Regional Policy Plan, and have been a common goal of many of the Region's local governments for decades. In addition, Council suggested that obtaining such a grant and completing a HUD-sponsored plan for the Region would: 1) help the Region better-compete nationally and within the state for scarce federal dollars; and 2) encourage better cooperation and problem-solving on issues of mutual regional interest. As such, Council instructed staff to pursue the SCI planning grant.

In order to pursue this grant and ensure a multi-jurisdictional effort, Council partnered with the South Florida Regional Planning Council and over 200 public, private, and nonprofit/civic organizations within a seven-county area (Monroe, Miami-Dade, Broward, Palm Beach, Martin, St. Lucie and Indian River) in early 2010. This partnership became known as the “Southeast Florida Regional Partnership” (Partnership).

The Partnership adopted the federal agencies’ six livability principles, and went a step further adding a seventh: To “Enhance community resiliency to the impacts of climate change.” Subsequently, the Partnership submitted a grant application to HUD and was selected as one of 45 recipients (and one of the top four) of the first round of Federal SCI grants in the amount of \$4.25 million.

As a result of the grant received, the Partnership created a Work Plan (approved by HUD on May 11, 2011) to develop a “Regional Vision and Blueprint for Economic Prosperity” (RVB) for the seven-county area. The goal of the RVB is to establish a comprehensive regional plan, identifying critical projects and infrastructure to improve sustainability and to be used as a guide to prioritize and focus future local, state and federal investment and policies. The overarching purpose of the resulting regional plans is to help communities become economically strong and environmentally sustainable.

Additional information about HUD’s Sustainable Communities Initiative and the RVB (formerly known as the 2060 Southeast Florida Regional Plan for Sustainable Development Project) is provided in three attachment documents entitled: Executive Summary (Attachment B), Abstract (Attachment C) and Frequently Asked Questions (Attachment D).

Background

The Work Plan defines the process for addressing the issues and working towards the goals of the RVB. One of the mandates of the Work Plan is to select a Master Consultant to assist in the creation and implementation of the plan.

A selection process for a Master Consultant was conducted by the Partnership’s five-member Management Team. On June 24, 2011, the Partnership issued a Master Consultant Request for Statement of Qualifications (SOQ). The deadline for proposals was Friday, July 22, 2011. Submitted proposals were reviewed and submitted to a seven-member Technical Review Committee (TRC) for a preliminary ranking (see Attachment A).

Each TRC member considered 69 different criteria and scored proposals on a scale from 1 to 100. This initial process distinguished the top five ranked firms, all of which were invited to participate in a final interview process.

The final interview process was held on August 24, 2011, at the Flagler Gallery, in the City of West Palm Beach. Each of the five top-ranked teams made a presentation to the TRC followed by a question and answer session. After the presentations, the TRC convened, evaluated and scored each presentation. The Management Team evaluated all SOQ responses, attended the final interview process, and tallied the TRC’s scoring. Based on this scoring, the top three teams were selected and ranked as follows:

- First: Team led by Dover Kohl & Partners
- Second: Team led by Cambridge Systematics
- Third: Team led by Calthorpe Associates.

Recommendation

Council should authorize the Executive Directors of the two Regional Planning Councils to initiate negotiations with Dover Kohl. Negotiations should include costs, schedule, HUD-approved Work Plan

requirements, as well as compliance with all approved HUD guidelines. If an agreement cannot be reached with the Dover Kohl team, the Executive Directors will initiate negotiations with the other selected teams in the order they were ranked.

Attachments

RANKING EVALUATION REPORT

TITLE: SOUTHEAST FLORIDA REGIONAL VISION AND BLUEPRINT
FOR ECONOMIC DEVELOPMENT

REQUEST #: SOQ#6

TABLE OF CONTENTS

1	SUMMARY	2
2	THE EVALUATION	2
2.1	EVALUATION PANEL PARTICIPANTS	2
2.2	SOQ ADVERTISEMENT	3
2.3	SUBMITTALS RECEIVED	3
2.4	PRELIMINARY RANKING	4
2.5	INTERVIEW/FINAL RANKING	4
3	MANAGEMENT TEAM RECOMMENDATION	5
3.1	BASIS FOR RECOMMENDATION	5
3.2	RECOMMENDATION	6

1. SUMMARY

On June 24th, 2011, the Southeast Florida Partnership issued a Master Consultant Request for Statement of Qualifications for the Southeast Florida Regional Vision and Blueprint for Economic Development (SOQ).

Proposals were received on Friday, July 22nd, 2011 and subsequently reviewed by the Management Team for completeness, format appropriateness and timeliness.

All submitted proposals were accepted and forwarded to the seven-member Technical Review Committee (TRC) for a preliminary ranking.

Each TRC member considered 69 different issues/categories and scored proposals on a scale from 1 to 100. This initial process distinguished the top five ranked firms, all of which were invited to participate in a final interview process.

The final interview process was held on August 24th, 2011, at the Flagler Gallery, in the City of West Palm Beach. Each of the five top-ranked teams made a presentation to the TRC followed by a question and answer session. After the presentations, the TRC convened, evaluated and scored each presentation.

2. EVALUATION

2.1 EVALUATION PANEL – TECHNICAL REVIEW COMMITTEE

The seven-member Technical Review Committee was integrated as follows:

JIM MURLEY: *Deputy Director, South Florida Regional Planning Council and Project Director for the Southeast Florida Regional Partnership.*

MICHAEL BUSHA, AICP *Executive Director, Treasure Coast Regional Planning Council.*

RANDY WHITFIELD *Executive Director of the Palm Beach County Metropolitan Planning Organization.*

LOIS BUSH *Florida Department of Transportation District Four - Intergovernmental Coordinator*

RAMON TRIAS, AICP *Architect, Urban Designer, Chair of the Treasure Coast Regional Planning Council.*

HENRY CRESPO *President of URGENT, INC. – A non-for-profit organization To Empower and Revitalize Urban Communities, as well as a provider of social services education, training and affordable housing.*

JULIA TREVARTHEN *Planning, Zoning and Development Director for the City of Boca Raton, FL*

2.2 SOQ ADVERTISEMENT

The SOQ was advertised in the following websites/venues:

- SFRPC website
- TCRPC Website

- DemandStar Onvia
- American Planning Association
- Planetizen

2.3 SUBMITTALS RECEIVED

- **CALTHORPE ASSOCIATES**, in collaboration with: Fergonese Associates; EDSA; Whitehouse Group Inc; Siemon & Larsen; RCLCO; Collective Strength.
- **CAMBRIDGE SYSTEMATICS**, in collaboration with: Kimley Horn & Associates, Inc.; Renaissance Planning Group; AECOM Technical Services; Collins Center for Public Policy; Content Creators, LLC; Dickey Consulting Services, LLC; The Firefly Group; Media Relations Group, LLC; FAU, FIU, Mark Buchbinder; James Carras; Jean Scott; Jonathan Barnett; Robert Grow.
- **DOVER KOHL & PARTNERS**, in collaboration with: Duany Plater Zyberk and Company, Criterion Planners, Robert Burchell, PhD, Rutgers University, Strategic Economics, Anthony Downs, Ph.D.; Christopher Leinberger; Gorman & Associates; Emerge Consulting; Cardno ENTRIX; Cardno TBE; Spikowski Planning Associates; Municipal Code Corporation (MuniCode); HDR Inc.; Hall Planning and Engineering; Crowdbrite; University of Miami.
- **GOODY CLANCY**, in collaboration with: Ana Gelabert Sanchez; Lewis Stroud & Deutsch; PlaceMatters; Placeways LLC; Kittelson & Associates; Miami Economic Associates; Mt. Auburn Associates; Rhodeside & Harrell, Arup, TischierBise; The Curtis Group; Kristopher Smith; Lucido & Associates; McNicholas & Associates.
- **IBI Group Inc.**, in collaboration with: Tunnell-Spangler Welsh & Associates; Jones & Jones; Fishkind & Associates; PLACE Alliance; Miller Legg; Gateway Planning Group; Economic Stewardship.
- **JACOBS ENGINEERING**, in Collaboration with: Wallace Roberts & Todd; VHB Miller Sellen; Arup; MAGBE Consulting Services; Adams Consulting Group; LB Limited Associates; Lucido & Associates; CREC; Healthways; Shelly Lauren; Place Matters.

2.4. PRELIMINARY RANKING

The review of submittals by the TRC distinguished the top five-ranked teams. The top-five ranked teams, in alphabetical order, were:

- CALTHORPE ASSOCIATES
- CAMBRIDGE SYSTEMATICS
- DOVER KOHL & PARTNERS
- GOODY CLANCY
- JACOBS ENGINEERING

On August 10th, 2011, all teams received notification regarding the preliminary selection. On August 16th, 2011, top ranked firms received notifications regarding details for the final selection interview (time, location, format, special instructions).

2.5. INTERVIEWS/FINAL RANKING

On August 24th, 2011, the TRC convened in the City of West Palm Beach to conduct the final selection interviews. This was an all-day event in which each team had a total of 75 minutes to present. This allotted period included set-up, presentation and Q & A time.

Upon finalizing all presentations, TRC members convened, discussed and scored each team presentation. The TRC members considered seven different scoring categories which included:

- Overall presentation and information submitted (SOQ),
- Economic Development experience and strategies proposed,
- Building Foundation proposed,
- Public Participation methodology proposed,
- Team's Experience,
- Top Choice justification, and
- Responses to general TRC questions

TRC scores were tallied and a "Lead Consultant" was determined using three different methodologies, as follows:

- Numerical Ranking
- Raw Average Score Ranking
- Raw Score Ranking

FINAL RANKING

As a result of the application of all three methodologies, a consistent ranking resulted as follows:

FIRST: DOVER KOHL & PARTNERS, in collaboration with: Duany Plater Zyberk and Company, Criterion Planners, Robert Burchell, PhD, Rutgers University, Strategic Economics, Anthony Downs, Ph.D.; Christopher Leinberger; Gorman & Associates; Emerge Consulting; Cardno ENTRIX; Cardno TBE; Spikowski Planning Associates; Municipal Code Corporation (MuniCode); HDR Inc.; Hall Planning and Engineering; Crowdbrite; University of Miami.

SECOND: CAMBRIDGE SYSTEMATICS, in collaboration with: Kimley Horn & Associates, Inc.; Renaissance Planning Group; AECOM Technical Services; Collins Center for Public Policy; Content Creators, LLC; Dickey Consulting Services, LLC; The Firefly Group; Media Relations Group, LLC; FAU, FIU, Mark Buchbinder; James Carras; Jean Scott; Jonathan Barnett; Robert Grow.

THIRD: CALTHORPE ASSOCIATES, in collaboration with: Fergonese Associates; EDSA; Whitehouse Group Inc; Seimon & Larsen; RCLCO; Collective Strength.

3. MANAGEMENT TEAM RECOMMENDATION

3.1 BASIS FOR RECOMMENDATION

On August 24th, 2011, the TRC convened in the City of West Palm Beach to conduct the final selection interviews.

This was an all-day event in which each team had a total of 75 minutes, which included set-up, presentation and Q & A time.

3.2 RECOMMENDATION

The Management Team evaluated all SOQ responses, attended the final interview process, and evaluated the TRC's scoring and suggestions to reach the following recommendation:

The Management Team recommends that the two Executive Directors initiate negotiations with the "Lead Team":

DOVER KOHL & PARTNERS, in collaboration with: *Duany Plater Zyberk and Company, Criterion Planners, Robert Burchell, PhD, Rutgers University, Strategic Economics, Anthony Downs, Ph.D.; Christopher Leinberger; Gorman & Associates; Emerge Consulting; Cardno ENTRIX; Cardno TBE; Spikowski Planning Associates; Municipal Code Corporation (MuniCode); HDR Inc.; Hall Planning and Engineering; Crowdbrite; University of Miami.*

Negotiations shall include costs, schedule, HUD approved work plan requirements, possible team expansion (i.e. inclusion of other consultants or Consortium Members as/if deemed necessary), as well as compliance with all approved HUD guidelines.

Subsequent to the initial negotiations, a Status Report will be prepared and provided to the Operations Committee and the Executive Committee.

If an Agreement cannot be reached with the Lead Team, the Executive Directors will initiate negotiations with the other selected teams in the order they were ranked.