

Request for Qualifications (RFQ) for Strategic Planning and Facilitation

Addendum #1, Issued September 2, 2022

Thank you for your interest in responding to the Capitol Region Council of Governments' Strategic Planning and Facilitation Request for Qualifications (RFQ). The purpose of this addendum is to respond to issues raised, including questions that were emailed to esanderson@crcog.org as of 3:00 PM on Thursday, August 25, in accordance with requirements published in the RFQ. Questions and responses have been categorized, and similar questions have been consolidated:

Budget

1. Question: Is there a budget or budget range for this project? If so, what is it?

Response: Management has budgeted \$25,000 for this project.

Previous Strategic Planning Process

2. Question: Has the Council previously engaged in a strategic planning process? If so, would the Council provide a copy of that plan? Can the Council please describe what was noteworthy about the previous strategic planning process and what improvements it is hoping to make during the upcoming planning cycle? How have you evaluated your progress to that plan?

Response: In 2014, CRCOG conducted its most recent strategic planning effort in collaboration with the Pioneer Valley Planning Commission. Please see the link below to that plan (*One Region, One Future*). The 2014 plan was laudable in many respects and the challenges and the action steps outlined in that document remain relevant. However, for its upcoming strategic planning effort CRCOG's management team intends to focus more on CRCOG as an organization, the services that it currently provides to its members, current projects and initiatives, its organizational values, and how CRCOG can best evolve to best meet the needs of our members over the next three to five years.

https://crcog.org/wp-content/uploads/2016/06/CRCOG-Action-Plan-Final_101514_compressed-1-1.pdf

CRCOG also relies upon its Regional Plan of Conservation and Development (POCD), Comprehensive Economic Development Strategy (CEDS), and Metropolitan Transportation Plan (MTP) to serve as principal planning documents.

<https://crcog.org/regional-plan-of-conservation-and-development/>

<https://crcog.org/wp-content/uploads/2019/04/CRCOG-CEDS-full-plan.pdf>

<https://crcog.org/2016/06/long-range-transportation-plan/>

3. Question: Did the council procure these services through another vendor in the past? If so, is that vendor allowed to bid on this new opportunity? Who is the vendor who was involved in past work?

Response: Due to staff turnover, management does not know if the parties retained a consultant to assist with *One Region, One Future*. CRCOG will routinely retain a consultant to assist with preparing one of its major planning documents, such as the POCD, CEDS, and MTP. Those vendors are permitted to bid on this opportunity.

4. Question: Please describe how you hope to have the staff work with the vendor in writing the strategic plan. Will the vendor be solely responsible for the writing or will it be a collaboration?

Response: Management is not looking to produce a lengthy document as part of this exercise. Our goal is to produce a concise document that has some timeless elements yet is dynamic and flexible enough to meet changing conditions. CRCOG is also fortunate to have a number of skilled writers on staff who can assist with preparing the final work product, particularly with any technical elements.

Stakeholder/Community Engagement

5. Question: Approximately how many stakeholders does the Council envision including/engaging in the strategic planning process?

Response: The primary stakeholders will include our staff (30) and the Policy Board (40). Once we have a working draft we also seek input from the Transportation Committee, the Regional Planning Commission, the Public Safety Council and the members of the Municipal Services Committee that do not serve on the Policy Board.

6. Question: Will this work include the involvement of stakeholders outside of your board?

Response: We plan to engage the staff and committees referenced in Q5 above.

7. Question: How many stakeholders will be involved in planning sessions?

Response: As stated above, the primary focus will be on the staff and policy board for a total of 70 people. At a later stage management would also seek input from the other committees referenced in Q5 above, which probably total another 100 people.

8. Question: Will CRCOG provide contacts for community engagement, or will that be part of the scope for services? In other words, will we have to recruit members of the community, or do they have partners who can help us with that?

Response: CRCOG will provide all necessary contact information for the stakeholders involved in the process.

9. Question: Is CRCOG interested in engaging community members (not just political stakeholders) in strategic planning?

Response: Only those highlighted in the response to Q5 above.

10. Question: Will the vendor work with a steering committee or strategic planning committee? Or, who will we work closely with?

Response: The vendor will work with a steering committee comprised primarily of staff.

11. Question: Does the Council have preferred or “tried and true” ways (e.g., surveys, focus groups, interviews, forums, or virtual platforms) of getting feedback from specific stakeholders to inform the strategic planning process? If so, can the Council please describe these ways?

Response: Management believes that facilitated sessions with the groups mentioned above will prove the most effective and economical way to solicit feedback for this project.

12. Question: What is the Council’s expectation for in-person meetings? We envision being on-site for facilitation of plan development; however, is it possible to do preparatory work—such as interviews and project planning — virtually?

Response: Management believes that in-person facilitation is generally more effective. We cannot see a need to require the vendor to conduct preparatory work or interviews on location.

13. Question: Does this require onsite presence?

Response: See response to Q12 above.

Project Timeline

14. Question: Does the Council have an anticipated timeline for completion of this 3-to-5-year strategic planning project?

Response: Management would like to complete this project in 6-9 months.

15. Question: The RFQ indicates that you intend to award a one-year contract with the possibility of 2 one-year extensions? Can you expand on what the purpose of the extensions will be?

Response: CRCOG does not anticipate this process exceeding one-year; however, management has added the possibility of extension(s) in the case of unforeseen circumstances.

16. Question: Is there an expectation that the vendor selected will assist CRCOG in implementing the strategic plan?

Response: No.

Insurance Requirements

17. CRCOG reserves the right to negotiate terms of insurance requirements with a selected consultant.