

DEPARTMENT OF COMMUNITY AFFAIRS  
TECHNICAL ASSISTANCE SERIES

# WHO WILL PREPARE YOUR COMPREHENSIVE PLAN?

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GUIDEBOOK FOR CITIZENS  
AND LOCAL PLANNERS

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## OVERVIEW OF THE GUIDEBOOK

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Your community is faced with the need to prepare a new or updated comprehensive plan. One of the first decisions you must make is not about the contents of the plan, but who will prepare the plan. In the guidebook [Why Do We Plan?](#) it is pointed out that an essential preliminary step in the planning process is a “plan to plan.” In this step before the actual planning begins, you must consider how time, talent, money, and energy will be provided to carry out the planning process. The first question in “planning to plan” is deciding *who will prepare the plan?*

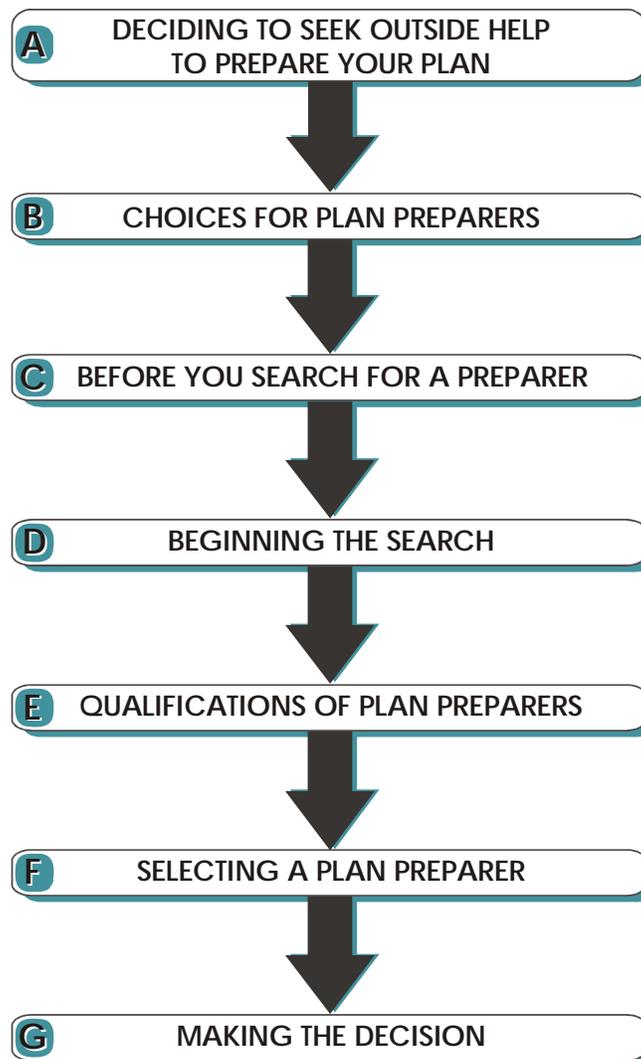
This guidebook provides specific guidance on that question. There are a series of steps you should take to make the decision and select the right person or group to prepare your plan. This guidebook describes the key steps and provides directions on carrying out each step. Finally, there is a list of additional resources to further assist you in this important endeavor.

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## STEPS FOR FINDING A PLAN PREPARER

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The flow chart below guides through each step of the process in your decision to seek outside help.



## A. Deciding to Seek Outside Help to Prepare Your Plan

Do you need someone in addition to your local government staff to help prepare your plan? As you plan for your comprehensive plan, you must decide who will perform the tasks in the planning process. Often, larger governments have a planning staff that may be able to take on this additional project. Smaller local governments may have no planning staff, or one “all purpose” planner. Even the larger governments may need to supplement the planning staff that is consumed with the day-to-day work of planning and zoning. The question to ask is whether you have the ability, technical expertise, and time to carry out the entire planning process.

When you have outlined the work needed to prepare a comprehensive plan, you can determine how much of this work can be conducted by existing staff. This evaluation will tell you how much assistance you need. You may decide to increase staff, seek outside help, solicit citizen volunteers, or a combination of these approaches. It is important to evaluate the scope of the planning work and determine how much assistance you need before seeking a plan preparer. You should also determine how much time is required for the selection process and establish a time line for searching for and selecting a plan preparer.

*What will the plan preparer do?* Your decision to seek additional help to prepare your comprehensive plan is not limited to how much assistance you need. You should also consider how the assistance will be provided. There are three general categories of assistance:

- Preparing the entire plan
- Preparing specific components of the plan
- Coaching the staff and/or volunteers as they prepare the plan

Even if you hire a plan preparer for the entire plan, local staff and officials will still be involved. The plan preparer may:

- Conduct research, such as studies on a specific issue, or collect and analyze information for a community assessment;
- Prepare maps to depict specific information and to identify community character areas;
- Develop policies and strategies;
- Facilitate meetings, organize and carry out a community involvement program;
- Write and edit documents; or
- Coach and advise other plan preparers.

No matter what tasks are assigned to a plan preparer, you must still read and review the material and ultimately accept and use the documents that are prepared. You cannot simply hand over the planning process; your local government will be involved throughout. Therefore, when you decide about seeking outside assistance, you will be deciding what you can do with local staff and volunteers and what you need someone else to do.

*Coaching.* Coaching is one way that outside assistance can help you when you have people who are willing to do the work of planning, but who are not trained or experienced in the planning process and the details of preparing a plan. A plan preparer may be hired as a coach. This means that you will have someone to explain methods and planning concepts; provide direction on sources and uses of information; provide comments on documents that you prepare; and make recommendations for carrying out meaningful community involvement. A coach does not conduct research or write documents, but is an advisor, teacher, and guide as you do the work yourself, whether the work is done by staff, volunteers, or a combination.

## B. Choices for Plan Preparers

There are many people, groups, or organizations that can provide the planning assistance you need. When you think about hiring someone to prepare your plan or assist in specific ways as you prepare your plan, consider the following:

1. Regional Development Center (RDC) – Throughout Georgia there are [regional development centers](#) that provide planning assistance to the cities and counties within their region. Often, the planners who work for the RDC in your region are able to provide a full range of planning services, including preparing the comprehensive plan or some portion of the plan. If you issue a Request for Proposals (RFP), you may include the RDC on the mailing list. (See “Beginning the Search” below for a description of the Request for Proposal process.) However, if you already have a contractual relationship with the RDC, you may engage the RDC for the comprehensive plan. If you do so, you should still consider the information in this guidebook to ensure that you have a good scope of work and have considered all of the pertinent issues.
2. County – If your jurisdiction is a small town, you may be able to contract with the county for comprehensive planning services. While you would not go through a Request for Proposal process with the county, you should consider the information in this guidebook in determining what kinds of assistance you will need and including enough detail in a contract to cover the issues

presented here. This means that you will develop a detailed scope of services and ensure that the planners assigned to your city will meet your needs.

3. Private consultants – A planning consultant may be one person, a planning consulting company with several employees, or a firm with several types of services, such as engineering or architecture as well as planning. You should use the Request for Proposal process to solicit and select a consultant.
4. College or university – You may be able to coordinate with the faculty in a college or university to conduct some of the work you need for your comprehensive plan. Faculty members may work as consultants for your community, with or without students to assist in the work. Depending on the services that you need, you are not limited to faculty and students in a graduate planning program. If you have specific needs for environmental studies, infrastructure planning, urban design, or other specialized areas, you can seek assistance from engineering, architecture, or environmental science faculty. If you are issuing a Request for Proposals, you may wish to mail it to the faculty that provides such services to ensure that you have an opportunity to consider this group. However, you may be able to contract directly with a college or university for some portion of your work without the RFP process. Be sure to consider the issues in this guidebook to ensure a good scope of services.
5. Not-for-profit organizations – There may be public interest or special interest organizations that are able to provide specific assistance in your planning program. Such groups may include environmental organizations with particular knowledge about your area (Sierra Club, Audubon Society, conservancy groups, and others), the companies that provide water and sewer in your area, and the Metropolitan Transportation Organization. The local chamber of commerce and the economic development agency, if your community has such a group, will have population information as well as useful economic data. Housing agencies can provide valuable information about housing, including the need for affordable housing. Include such groups on the mailing list for the Request for Proposal to ensure that such organizations have an opportunity to present their credentials and proposal to work with you.
6. Volunteers – Citizens in your community and members of the Planning Commission or Planning and Zoning Board may have expertise in one or several areas important to the plan. These individuals are a valuable resource that should not be overlooked. You may be able to use an entirely volunteer team or you may want to combine a volunteer team with one of the other plan preparers. The other plan preparer may provide specific

components of the planning process or may serve as a coach to the volunteer team. (See “Deciding to seek outside help” above for a discussion of coaching.)

### C. Before You Search for a Plan Preparer

Once you have decided to hire a plan preparer, there are several issues to consider. The issues fall into three categories:

1. The work to be assigned to the plan preparer;
2. The qualities and characteristics you want in a plan preparer; and
3. The process for selecting a plan preparer.

*What work will be assigned to the plan preparer?* The group of issues related to the work to be assigned includes not only the specific tasks you expect a plan preparer to perform, but also the budget for the work and the time frame to complete the work. The work you will assign to a plan preparer will range from assistance on a specific part of the planning process, perhaps conducting background studies and collecting data as part of the community assessment, to carrying out the entire planning process. You must decide what degree of assistance your community needs and outline the work you expect a plan preparer to do. (See “What will the plan preparer do?”)

You should not rely on the Request for Proposal process to determine what work is needed. This means that you are not asking the plan preparer to “tell us what we need to do” and then “tell us how you will do it.” It would be extremely difficult to compare proposals through this approach. You are the only one who knows what work is needed for your own community. The following list of tasks will help you outline the work you need:

- Data collection and analysis
- Preliminary and final identification of character areas
- Preliminary and final identification of issues
- Facilitating participatory exercises (charrettes, visioning sessions, etc.) to help stakeholders and citizens decide on vision for the community.
- Development and implementation of a community participation program
- Preparation of the community assessment document
- Preparation of the community agenda document
- Preparation of a set of digital and hard copy maps
- Review of existing zoning, other ordinances, and land use regulations and recommended changes to make them consistent with the new comprehensive plan – or preparation of a new unified land development code
- Attendance at meetings with staff

- Facilitating public workshops
- Assistance during the adoption process
- Coaching existing staff or citizen volunteers through the planning process.

Of course, a proposal will add detail to the work you describe in the RFP. It is also appropriate to hire a plan preparer to assist in developing a detailed scope of work for the entire plan. If you take this approach, a detailed scope of work for the comprehensive plan will be one of the work products during the project. Unless you are hiring a plan preparer to develop a detailed work program, the local government should decide *before* seeking a plan preparer what work you need.

*Budget.* You should also establish a budget for the work you want from a plan preparer. The cost of developing a comprehensive plan, or some portion of the plan, is based on the hours spent in performing the work. The prospective plan preparer will estimate the time needed for each service to be provided and develop a budget based on the time and the costs for the persons who will provide the services. When you select a plan preparer, you should not make the decision based solely on budget. However, it is important to know that a plan preparer is able to provide the services within the budget that is available for your jurisdiction. By indicating how much you are able to spend on outside services, the groups that submit proposals can describe what they can provide for the budget that you have. Otherwise, you will be faced with comparing proposals with a wide range of services and it will be difficult to compare and evaluate such different proposals.

Another important issue related to the work of the plan preparer is the organization of your jurisdiction and its readiness to work with outside assistance. Decide who will be the primary contact (project manager) in your local government. The plan preparer should conduct all communication through a city or county project manager for the planning process. This project manager should be someone who can make decisions at the staff level, provide direction, coordinate with other staff for review of work products, prepare progress reports, and coordinate with the elected body as the project evolves.

The remainder of this guidebook addresses the second and third categories of issues: qualities of a plan preparer and the selection process. Now that you have considered the information needed **before** you begin the search, you are ready to consider what specific qualities and characteristics you want in a plan preparer and to establish the details of the process.

## D. Beginning the Search

The search for a plan preparer typically involves either a Request for Qualifications (RFQ) or a Request for Proposals (RFP). The use of the RFQ is a two-step process of identifying qualified plan preparers before seeking specific proposals with a detailed work program. The RFQ asks prospective plan preparers to submit statements that describe the qualifications of the company and professionals to conduct the work you need. The RFQ process is a way to limit the number of plan preparers who will submit detailed proposals.

The RFP is a one-step process that seeks not only information on qualifications, but also specific proposals for a work program and possibly a budget. Because the RFP combines both sets of information, you must evaluate qualifications as well as proposed work programs for all submissions. However, you may choose the RFP process because it is often a shorter process.

*What is the RFP?* It is an advertisement that your community wants someone to provide specific planning services. The RFP should provide some background on your community, outline the services you want, describe the qualifications you expect in a plan preparer, and describe the process you will use to select the plan preparer.

The process for selection includes deciding who will evaluate the proposals and whether this group (often called a “selection committee”) will make recommendations to the elected body that makes the final decision. The selection committee should be appointed and include people who know about the community and its needs. This committee will evaluate all proposals and decide whether the proposals meet the criteria set out in the RFP. The committee will conduct the interviews (see “Selecting a plan preparer” below), may assign scores and rank the submissions, and may make recommendations to the elected body. If the elected body wants to be more “hands on” in the decision, the elected body may rely on the selection committee for evaluations, but conduct the interviews itself before deciding on rankings and selection.

The appendix contains a detailed outline of the contents of an RFP. You may not need all of the information described in the appendix in your RFP, but this outline will provide an excellent starting point for developing an RFP.

## E. Qualifications of Plan Preparers

What makes a plan preparer qualified to assist you with your planning needs? In short, qualifications consist of training and education, experience, and reputation.

*Training and education.* The proposal should contain resumes of the people that will work on the project. The type of education that these people have should be appropriate for the services they will perform. Some individuals may have advanced degrees and continuing education that is pertinent to the tasks they will perform. You should also consider whether the people on the team are engaged in training others on specific skills and processes of planning. This can indicate a high level of training and experience for the individual who is providing the services. Consider training and education not only in planning, but also in mapping and GIS, environmental science, facilitation skills, engineering, urban design, and other related areas. However, training alone is not enough.

*Experience.* The proposal should clearly indicate the experience of the individuals who will do the work and the experience of the company or organization as a whole. It is important that each member of the team have specific, relevant experience in the kinds of planning services that you need. You should also consider whether the individuals have worked together, either because they are all employed by the same company or organization, or because they have past working relationships on other teams. There may be a “lead” consultant and one or more “sub” consultants to create a team of individuals. It is not necessary that all members of the team have worked in the same team arrangement before, but there should be evidence that some of them have worked together before. The qualifications statements should provide you some assurance that there are established, successful working relationships among team members.

Experience may include working for state or local government in Georgia and other states and may include working for private property owners or public interest organizations. A variety of experience will be useful to you because the plan preparer will see issues from more than one perspective. Consider whether the experience includes work as an employee of these entities as well as working as a consultant for such entities.

You may receive proposals from a firm that is fairly new and has little or no “firm experience.” However, if the individuals have a solid background, the length of time the firm has been in business should not be a key factor.

Descriptions of experience should include identifying similar projects that team members have carried out. There should be enough information to determine what

services were provided and whether the project was successfully completed on time and within budget. This will allow you to contact past clients to determine how the plan preparer performed.

*Reputation.* You may already know something about the prospective plan preparer because of his/her reputation. The person or group may be well known in your area, throughout Georgia, or throughout the country because of the type of work and quality of work provided. However, there is no substitute for contacting past clients to ask specific questions to make sure the plan preparer is the right fit for your situation. One firm may have a widespread reputation of providing quality work, but may not be exactly right for your community, because of size, location, or some unique local factors. Another firm that is less well-known but very reputable may be more suited to your needs.

Be careful in considering negative reputation information. Even the best firm may have a poor fit with a client, resulting in disappointment for both the local community and the plan preparer. Because planning is a very public process, volatile political climates sometimes make it difficult for any plan preparer to be fully successful. However, it is important to consider how the plan preparer has managed these difficult situations and gained improved ability to meet similar challenges.

Another aspect of reputation is whether the plan preparer has received awards and honors. The proposal should identify planning processes and products that have been evaluated by a jury of peers and recognized for excellence. One or more individuals on the team may have been recognized personally for performance and contributions to planning.

All of these things, training, education, experience, and reputation, together describe the qualifications of the plan preparer to assist your community with its planning needs.

## F. Selecting a Plan Preparer

*The selection process.* The selection process typically involves:

- Determining if each person or entity that submitted a proposal meets the minimum qualifications you established in the RFP;
- Evaluating the qualified proposals and determining which ones best meet your needs. At this point, you should prepare a preliminary ranking of the proposals, or select the top three to five proposals;

- Selecting the best proposals and inviting the person or entity to an interview. Typically, a local government selects at least three, and sometimes as many as five, proposals for further consideration. This is called a “short list;”
- Conducting interviews;
- Determining the final ranking of the entities that are short-listed; and
- Negotiating a contract.

*Evaluating the written proposal.* When you evaluate the written proposal, you should consider:

- How well the proposal addresses the issues in your RFP. Does it merely repeat what was contained in the RFP, or does it describe how the plan preparer will work with you to achieve the objectives you have described?
- Does the proposal demonstrate competence and the ability to seek effective ways to meet the specific needs in your community?
- What experience has the plan preparer had, not only with the issues you have described, but also in communities that are similar to yours? (See the discussion on “experience” above.)

*Checking references.* Part of the evaluation process includes contacting other communities that the plan preparer has worked with. This step typically occurs before an interview. When you talk to representatives of other communities, consider the following questions:

- What kinds of issues did the community face in its planning process?
- How did the plan preparer address those issues? Were the recommended approaches effective and appropriate for that community?
- If there were specific challenges in the process, what did the plan preparer suggest to meet the challenges?
- Was the community satisfied with the work performed by the plan preparer? Ask for specific comments on why the community felt satisfied or dissatisfied. In particular, ask if the work was completed according to the established time line and budget.
- How well did the plan preparer work with the citizens? Elected officials? Local government staff?
- Would the past client hire this plan preparer again?

*Interviewing the short-listed candidates.* When you interview potential plan preparers, be sure to allow enough time for a presentation by the person or group that submitted the proposal as well as enough time for your questions. It is especially helpful to prepare a set of questions that you will ask each group that you interview. This makes it easier to compare the responses of the potential plan preparers. A typical interview session includes 20 to 25 minutes for a presentation and 20 to 25 minutes for questions and answers. Be sure to schedule a brief break for the selection committee between interviews.

What should you look for in an interview?

- Are the people making the presentation and attending the interview the people that you will work directly with during the project? While a company may have a large number of people who might contribute to a project, you should meet the primary contributors at the interview.
- How do the people in the interview conduct themselves, both in making a formal presentation and in responding to questions? The behaviors during the interview are likely to be the behaviors that you will see during workshops and other public meetings. Are these people you will feel comfortable working with over several months?
- What is the current workload of the people who will work on your project? Is there enough time available for your work to fit in?
- What suggestions do the prospective plan preparers have to address some of the specific problems you expect to face during the planning process?

## G. Making the Decision

There is no formula for selecting someone to prepare your plan. When you follow the steps in this guidebook, you will be able to identify and evaluate potential plan preparers. However, the final decision will often require you to choose between two or three groups with similar experience, training, skills, and characteristics. The following tips may be helpful in making this decision.

1. Choose a plan preparer with experience in communities very similar to yours, both in size and composition and in terms of the issues you face in planning.
2. Choose a plan preparer who will add objectivity, stature, and credibility to the planning process.
3. Choose a plan preparer who will be received well by stakeholders and citizens of your community. The plan preparer must be able to communicate with citizens and stakeholders in a manner that is clear, is free of planning jargon, and treats the participants as equal partners in the planning process.
4. Consider how much creativity you want in your planning process. Decide if you are more interested in traditional solutions to problems or innovative solutions and select the plan preparer most likely to fit your needs.
5. Choose a plan preparer with the right team of professionals. You should be satisfied that the lead professional will be accessible throughout the project, but also be satisfied that the members of the planning team have the right skills and experience for your needs.

6. Consider how the project will be managed, how progress reporting will be handled, and how the plan preparer will ensure quality control throughout the project.
7. Be sure it is clear who will manage the project and what methods will be used to ensure a well-managed project. Also be sure it is clear which individuals will work with you on a day-to-day basis.

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## RESOURCES FOR FURTHER ASSISTANCE

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The American Planning Association (APA) has published a *Planning Advisory Report*, entitled “Selecting and Retaining a Planning Consultant.” PAS Report 443, written by Eric Damien Kelly, AICP, was published in 1993. However, he has prepared excerpts from this excellent document. These excerpts are available at the APA web site, [www.planning.org](http://www.planning.org). At the home page, select “consultant services” to access the excerpts. Topics include consultant selection procedures, the RFP, contracts, and managing consultants.

The *Planning Commissioners Journal* also contains several excellent articles by C. Gregory Dale on working with consultants. Reprints of these articles are available at the Planning Commissioners Journal web site, [www.plannersweb.com](http://www.plannersweb.com).

## APPENDIX

# GUIDE TO THE CONTENTS OF A REQUEST FOR PROPOSALS

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Your Request for Proposals (RFP) should include the following sections:

- I. Basic information to identify the project and the local jurisdiction issuing the RFP.
- II. Requirements for submission of a proposal.
- III. Required forms and statements.
- IV. Scope of work for the project.
- V. Project deliverables.
- VI. Description of the selection process.

The information needed for each of these sections is described below.

- I. Basic information to identify the project and the local jurisdiction issuing the RFP:
  - A. A title page including:
    - the name of the project;
    - contact person;
    - mailing address;
    - issuing department;
    - telephone and facsimile numbers; and
    - e-mail and website address.
  - B. A statement indicating that your community shall not be liable for any costs incurred by a prospective plan preparer in responding to this RFP or for any costs associated with discussion required for clarification of items related to this proposal including any future interviews by your community.
  - C. A brief overview of your community, including a description of important community characteristics and an introduction to the comprehensive plan project. If it is important to understanding the project, include population

and growth information. Include a brief statement of why your community is engaged in this project.

## II. Requirements for submission of a proposal.

- A. An arranged, pre-proposal meeting (if desired) including the date, time and location of the meeting. A pre-proposal meeting may be required or an optional meeting for a community, but it can be used as a way to describe the project and be available to answer questions from prospective plan preparers. This meeting can also help to establish contacts and provide an opportunity to see the interested plan preparers. Be sure to state clearly if attendance at the pre-proposal meeting is required in order to submit a proposal.
- B. Mailing instructions for the proposal. Be sure to provide the address for hand deliveries. Include a statement whether proposals will be accepted by fax. (It is recommended that proposals only be accepted in hard copy by mail or delivery service.)
- C. The deadline date and time for proposal submissions.
- D. The number of copies to be submitted. If the original is to be identified separately from the copies, be sure to include a statement about how to label the original.
- E. Specific labeling requirements for the submission package, such as the RFP number and deadline.

## III. Required forms and legal statements (consult your purchasing department and/or legal department to make sure all requirements are identified)

- Equal opportunity statement
- Drug-free workplace statement
- Non-collusion affidavit
- Description of insurance requirements

## IV. Scope of work for the project.

- A. A more detailed description of the jurisdiction, if needed, should be provided. This description could include the relationship with the other local governments, RDC, and neighboring communities.
- B. Identification of current and previous planning efforts and a list of all existing plans and planning-related documents that may be helpful to the proposed project, if applicable.
- C. A listing of existing map and data resources including the format of the resources. Formatting details should include the digital and hard copies

available, scale, and software that the community used to prepare the materials.

- D. Your community's anticipated budget (or budget range) for the project.
- E. The tasks or task groups that you want included in a work program. Consider the following topics:
- Data collection and analysis
  - Preliminary and final identification of character areas
  - Preliminary and final identification of issues
  - Facilitating participatory exercises (charrettes, visioning sessions, etc.) to help stakeholders and citizens decide on vision for the community.
  - Development and implementation of a community participation program
  - Preparation of the community assessment document
  - Preparation of the community agenda document
  - Preparation of a set of digital and hard copy maps
  - Review of existing zoning and other ordinances and recommended changes to make them consistent with the new comprehensive plan – or preparation of a new unified land development code
  - Attendance at meetings with staff
  - Facilitating public workshops
  - Assistance during the adoption process
  - Coaching existing staff or citizen volunteers through the planning process.
- F. Request that the proposal include the following sections:
- *Qualifications.* This section should describe the proposed project team, provide resumes of project personnel, describe the experience of the firm, organization, and/or individuals who are submitting a proposal, and provide a list of clients and client contact information for similar projects.
  - *Project Understanding.* A statement the plan preparer understands of your community's comprehensive planning needs.
  - *Overall Project Approach.* The plan preparer should identify the proposed approach to the project, including a detailed work program in narrative form. Graphics illustrating the proposed work program are encouraged. This work program should form the basis for a detailed scope of services in the contract negotiated with the selected plan preparer. Require an organizational chart which includes all project personnel, their responsibilities, and company affiliations.
  - *Mapping Approach.* The community should request detailed information on the mapping approach in the proposal submittal. In particular, digital mapping specifics should include the hardware and

software, data sets, sources, and other metadata (details on the information collected and/or developed), projection, datum, etc.

- *Proposed Approach to Public Participation.* Request that the proposal contain a description of methods to promote public discussion, group decision making, public hearings, dissemination of information, etc.
- *Project Timeline.* Your community should ask for an estimated schedule for completing the project accompanied by a timeline in a graphics format. Along with the timeline, the RFP should request an indication of time available for each of the persons who will contribute to the project.
- *Cost Proposal.* The proposal should contain information on billing rates, reimbursement of expenses for travel, printing, etc., and other cost information. If you want budget information in a particular format for ease of comparison of proposals, be sure to specify how the budget should be presented. You may wish to consider having the budget information submitted in a separate envelope for review after you make a short-list of prospective plan preparers to be interviewed.

## V. Project deliverables

A description of the deliverables (reports, maps, meetings, workshops, etc.) your community is expecting the consultant to produce by the end of the contract. Deliverables are the items your community will receive as a result of the preparation of the comprehensive plan. Some examples of common deliverables include:

- Public participation materials, such as survey results, brochures, posters, etc.
- Data and maps gathered and developed during the plan process.
- Copies of the draft and final plan, in hard (paper) copy and in digital (diskette, CD or other media for use with a computer) formats with appropriate software.
- If you want multiple copies of preliminary and final products, be sure to clearly specify how many such copies are needed.
- Materials for your local government web page.

## VI. Description of the selection process.

In this section, you should describe the time frame for evaluating proposals, holding interviews, and making a selection. If you will be using a point system or some specific method to evaluate proposals, consider putting the information in the RFP. Consider the following topics:

- Evaluation criteria
- Point system for determining rankings, if applicable

- Approximate time line for the selection process

Some other things to consider are:

- Whether you want samples of work, and if so, how many copies. Many plan preparers have work samples posted on one or more web pages; consider requesting web page addresses as an alternative to hard copies.
- Whether you want to include your standard contract for information to the prospective plan preparers.
- Whether you want to include a standard set of interview questions.