



**Date:** April 15, 2019

**To:** Thomas J. Bonfield, City Manager  
**Through:** Keith Chadwell, Deputy City Manager  
**From:** Patrick O. Young, Director, City/County Planning  
**Subject:** Durham Comprehensive Plan Community Engagement – Professional Services Contract Award to Planning NEXT

### **Executive Summary**

In September 2018, the Planning Department issued a Request for Proposals (RFP) for planning and engagement consulting services for the development of a new Durham Comprehensive Plan. The City and County are beginning the process of developing a new Comprehensive Plan to replace the one from 2005. The Comprehensive Plan will guide development in Durham and accommodate future growth, setting a cohesive vision for the community.

The Planning Department received eight responses to the RFP. Planning NEXT was selected and a scope of work for the project has been developed.

### **Recommendation**

The Planning Director recommends that the City Council authorize the City Manager to execute a contract with Planning Next for professional community engagement and planning services to develop a new Comprehensive Plan for Durham in an amount not to exceed \$250,000.00.

### **Background**

As part of the FY 2019 budget submittal, the Planning Department requested a new initiative to partially fund a new Comprehensive Plan. The \$250,000.00 budget item will be used to hire a consultant to assist Planning staff with the substantial community engagement facet of the process.

Robust community engagement is important because residents need to have a say in their future. As elected officials, appointed officials, and staff come and go, the Comprehensive Plan should endure and transcend these changes because it is deeply rooted in the vision of the community. Without a clear vision and actions grounded in extensive community outreach, Durham risks constant reexamination and debate of the issues and possible solutions, wasting time that could be spent implementing the Plan and making meaningful, long-lasting changes in the community.

A qualified engagement consultant is essential to the success of the Comprehensive Plan. The Planning Department proposes to conduct the data collection, analysis, policy drafting, and document publishing in-house, while the consultant will be responsible for the community outreach and collaboration process, marketing and branding, and will also provide technical review and advisement services to the staff team. The consultant will be the lead on these efforts but Planning staff will still be deeply involved with the various community engagement efforts. The tasks a consultant may lead include:

- Branding of the project and associated collateral;
- Hosting an interactive project website that is user-friendly and available in English and Spanish;
- Developing promotional materials (e.g. press releases, flyers, posters, etc.) and educational videos in English and Spanish;
- Providing and managing community engagement software and web tools;
- Conducting surveys, focus groups, stakeholder interviews, and roundtables (with Spanish translation available);
- Hosting community workshops (both large and small) and “pop-up workshops” (with Spanish translation available);
- Presenting to community groups, boards, and commissions (with Spanish translation available); and
- Facilitating City-County staff working groups.

The consultant team and Planning staff will work together to determine engagement strategies that will best engage different stakeholders within the community and at different points within the project timeline, and has agreed to fully follow the Equitable Engagement Blueprint. This work will include requesting demographic and geographic data from participants in order to determine how representative engagement efforts are. The project scope and timeline accounts for the ability to reassess engagement strategies to correct the imbalance in participation when it does not appropriately represent the cross section of communities in Durham.

There are three main reasons why the Planning Department is contracting with a consultant for the tasks above (and other associated tasks to-be-determined). They are:

- **Need for Additional Labor to Ensure Momentum, Quality, and Timeliness.** Without a consultant, staff will need to lead all aspects of plan-making. More tasks assigned to a limited amount of staff will either result in a plan of limited scope or a significant delay, eliminating project momentum and making the final product less relevant because of changing conditions and limited applicability. Other projects and new initiatives will also not have the appropriate resources because staff is focused solely on the Comprehensive Plan, making staff less proactive and responsive to other emerging challenges and projects. In two peer cities in North Carolina that staff spoke with (Greensboro and Raleigh), neither hired a consultant for their most recent Comprehensive Plan effort and this led to stops and starts, delays, and inefficiencies.
- **Need for Expertise and Outside Perspective.** Planning staff have years of expertise in plan-making and community outreach, but recognize that an outside consulting firm has a much more specialized understanding of comprehensive planning and associated outreach. Staff would benefit from additional expertise on the latest effective trends in community outreach,

including emerging technologies. Additionally, the consultant has an outside and unfiltered perspective that can be valuable when engaging with the community.

- **Need for Access to New Technologies for Community Engagement.** The consultant can bring a variety of media and technology platforms and software to a project that the Planning Department does not have access to or has limited experience in utilizing properly. They often have licenses with various technology platforms that allow them to provide them to clients more cost-effectively than if the client was to purchase each individually.
- **Leveraging Staff Resources.** The City and County staff do have staff with a wealth of expertise in engaging the community; however those staff resources are already committed to other priorities. Marshalling those resources for a multiple-year comprehensive planning process would require multiple departments across two organizations to prioritize this project over others.

### **Issues and Analysis**

In September 2018, the Planning Department issued a Request for Proposals for planning and engagement services for the new Comprehensive Plan. The department received eight responses to the RFP:

- IBTS
- Maslow Development
- Planning NEXT
- Renaissance Planning
- Ramey Kemp and Associates
- STRADA
- TPUPC
- WXY/HR&A

Six of the eight respondents met the EOEA requirements for the RFP and were invited to interview with three panels, each made up of a mix of staff, community members, and the development community. Those six proposals were also reviewed and scored by a technical staff committee. The two finalist respondents were invited to interview with the Planning Director and staff. Based on these reviews the Planning Department selected Planning NEXT for the project.

### **Alternatives**

One alternative would be to use any existing community engagement resources within various City departments in the development of the new Comprehensive Plan. Due to limited staff resources and competing priorities this would result in a much less authentic and robust community engagement effort than will result from contracting an outside resource to work with staff on more representative and meaningful engagement from a diversity of the Durham community.

### **Financial Impact**

Funding for this project is available in account OJ000000-725000.

The project includes the following task items:

Phase 0: Preparation	\$70,000.00
Phase 1: Big Questions and Project Launch	\$33,500.00
Phase 2: Big Ideas and Vision	\$48,500.00
Phase 3: Policy Framework	\$37,800.00
Phase 4: Actions, Strategies, Implementation	\$30,200.00
Phase 5: Review and Adoption	\$9,500.00
Technical Planning Consultation (throughout Phases 0-5)	\$20,500.00
<b>Total Project Cost</b>	<b>\$250,000.00</b>

**Equal Business Opportunity Summary**

The Equal Opportunity/Equity Assurance Department reviewed the proposal submitted by Planning Next and determined that they are in compliance with the Ordinance to Promote Equal Business Opportunities in City of Durham Contracting.

**M/W UBE REQUIREMENTS**

The M/W UBE goal for this RFP was 8% minority participation. Planning Next will subcontract to the following certified firms:

Firm	ID	City/State	Amount	% of Contract
Irma McLaurin Solutions	MUBE	Raleigh, NC	\$32,200.00	13%
Bilingual Communications	MUBE	Cary, NC	\$5,850.00	2%

**WORKFORCE STATISTICS**

**Total Workforce:**

**Planning NEXT**

Employment Category	Males					Females					
	White	Black	Hispanic	Asian or Pacific Islander	Indian or Alaskan Native	White	Black	Hispanic	Indian or Alaskan Native	Asian or Pacific Islander	Indian or Alaskan Native
Project Manager	3	0	0	0	0	2	0	0	0	0	0
Professional	1	0	0	0	0	1	0	1	0	0	0
Technical	1	0	0	0	0	2	0	0	0	0	0
Clerical	1	0	0	0	0		0	0	0	0	0
Labor		0	0	0	0		0	0	0	0	0
<b>Totals</b>	<b>6</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>5</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Bilingual Communications**

Employment Category	Males					Females					
	White	Black	Hispanic	Asian or Pacific Islander	Indian or Alaskan Native	White	Black	Hispanic	Indian or Alaskan Native	Asian or Pacific Islander	Indian or Alaskan Native
Project Manager	0	0	0	0	0	0	0	0	1	0	0
Professional	0	0	3	0	0	0	0	0	2	0	0
Technical	0	0	0	0	0	0	0	0	0	0	0
Clerical	0	0	0	0	0	0	0	0	0	0	0
Labor	0	0	0	0	0	0	0	0	0	0	0
<b>Totals</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>

**Irma McClaurin Solutions**

Employment Category	Males					Females					
	White	Black	Hispanic	Asian or Pacific Islander	Indian or Alaskan Native	White	Black	Hispanic	Indian or Alaskan Native	Asian or Pacific Islander	Indian or Alaskan Native
Project Manager	0	0	0	0	0	0	0	0	0	0	0
Professional	0	0	0	0	0	0	1	0	0	0	0
Technical	0	0	0	0	0	0	0	0	0	0	0
Clerical	0	0	0	0	0	0	0	0	0	0	0
Labor	0	0	0	0	0	0	0	0	0	0	0
<b>Totals</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Attachments**

- Attachment 1, Planning Next Scope of Work
- Attachment 2, Time-Product-Payment Schedule