



SHAKER HEIGHTS

Memorandum

To: Members of City Council

From: Joyce G. Braverman, Director, Planning Department

cc: David E. Weiss, Mayor
Jeri E. Chaikin, Chief Administrative Officer

Date: January 17, 2019

Re: Coordinated Facilities Vision Plan—
Recommendation to Award Contract to Planning NEXT & Request for Additional
Appropriation of \$35,186.00

The City of Shaker Heights, Shaker Heights City Schools, and Shaker Heights Public Library issued a Request for Proposals (RFP) seeking a facilitator to assist in a coordinated facilities planning process on November 19, 2018. A Task Force comprised of representatives from all three entities was formed to lead this effort. Based on discussions with this Task Force, the primary purposes of the project are to:

1. Craft a long-term vision;
2. Identify and share long-term facilities priorities;
3. Plan for limited resources;
4. Share estimates of resources and services;
5. Anticipate funding needs;
6. Explore areas for coordination and collaboration on capital improvements; and
7. Develop an overall master facilities plan for the community.

The project has two phases: Phase 1) Visioning, and Phase 2) Physical Space Study and Master Plan. The RFP addresses work for Phase 1.

A ballpark budget of \$40,000 was shared as part of the RFP process. The consultant contract will be held by the City of Shaker Heights, but the three entities have agreed to pay for Phase 1 of the project in equal amounts. This will be reflected in an initial Memorandum of Understanding (MOU) and finalized in a formal agreement.

The Coordinated Facilities Master Plan Phase 1 Visioning RFP was issued to seventeen (17) firms, distributed to the AIA (architects) and APA (planners) professional organizations, and posted on the City's website. Four proposals were received (see attached proposal comparison spreadsheet) and two interviews, shown in bold, took place on Thursday, January 10:

<u>Consultants</u>	<u>Price Proposed</u>
• Enlightenment Consulting Group	\$40,000
• Planning NEXT	\$47,000
• MKSK	\$75,190
• Weber Murphy Fox	\$122,500

Planning NEXT included optional work that would increase their base cost of \$47,000. If the selected optional work is pursued, their proposed price would total \$52,780.

All proposals were evaluated based on project understanding and approach, experience, past work, and price. The Selection Committee (Dr. Steve Wilkins, Interim Superintendent, Shaker City Schools; Amy Switzer, Director, Shaker Heights Public Library; Joyce Braverman, Planning Director; and assisted by Shaker Heights Planning Staff) reviewed the proposals and interviewed the two teams.

The Planning NEXT team quickly rose to the top during the interview process for the following reasons:

- Planning NEXT expertise is vision planning and associated public participation processes
- Depth of vision planning experience
- Seasoned project manager and focused team
- Immediately understood need for, and amenable to, adjusting scope to meet client needs
- Proposed fee reflected an understanding of client budget (\$47,000-\$55,980)
- References extremely positive

MKSK is also qualified. Although their proposal for this particular project was initially compelling, upon further review it was not a good fit and did not meet client needs:

- MKSK proposed a very large team, with ill-defined responsibilities for each member
- Inexperienced project manager
- Proposed fee was not reflective of client budget (\$75,190)

Recommendation

Following interviews, staff held a conference call with Planning NEXT to formalize scope adjustments and refine the proposed cost. Planning NEXT adjusted the scope and provided an updated cost of \$52,780 for Phase 1 of the project. The revised scope includes:

- Refinement of data gathering phase to include a building inventory and map, and tour of city and selected buildings.
- Addition of inward-facing stakeholder interviews and task force visioning to clarify project scope and focus information gathering from community.
- Two outward-facing meetings with the community.
- Inclusion of two optional tasks that the Client Group deemed valuable to the process:
 - A project identity package to facilitate streamlined communications from three organizations (\$3,340)

- Coordination of a speaker panel representing a variety of perspectives to kick-off planning process (\$2,440)

The Finance and Administration Committee approved this recommendation on January 22. They were overwhelmingly supportive of the cooperative nature of the project.

The Planning Department recommends entering into a contract with Planning NEXT in the not-to-exceed amount of \$52,780 for Phase 1 of the project. Payment of the contract will be equally shared by the organizations as follows:

- City of Shaker Heights \$17,594
- Shaker Heights Public Library \$17,593
- Shaker Heights City School District \$17,593

The Planning Department recommends accepting contributions of \$17,593 each from Shaker Heights City Schools and Shaker Heights Public Library for their share of the project payment.

In addition, \$50,000 is currently contained in the Planning Department operating budget for the City's share of both phases of the project. We request an additional appropriation of \$35,186 for the Library and Schools' share to bring the total appropriation to \$85,186.

We request that both the contract with Planning NEXT and requested appropriation be passed as an emergency and on first reading in order to meet the project timeline.

Coordinated Facilities Master Plan—Phase 1 Visioning Proposal Comparison

Team Members	Project Manager	Approach	Previous Projects/Experience	Fee	Anticipated Completion Date	Comments/Questions
Planning NEXT	Sarah Bongiorno	<ul style="list-style-type: none"> Facilitate an Orientation Workshop; gather all relevant data Develop an outreach plan and communications plan Facilitate four public workshops Prepare Community Vision Memo Discuss policies & initiatives through a Community Priorities Summit Finalize input from two rounds of public engagement Produce vision plan document 	<ul style="list-style-type: none"> Columbus State Community College Campus Planning “Fairgrounds to Future” (vision for former Montgomery County Fairgrounds site) ValpoNEXT Vision Plan and Creative District Plan 	\$47,000 Proposed fee does not include the following optional services: <ul style="list-style-type: none"> Develop a project identity Host a kickoff speaker series Conduct Council, Committees, and Boards meetings 	July 2019 (6 months)	<ul style="list-style-type: none"> No local representation on project team (located in Columbus)
MKSK (Lead) Project Management Consultants Bialosky	Arin Blair	<ul style="list-style-type: none"> Establish scope of work, schedule, and project management protocol Conduct initial collection of base information (Public Meeting #1); synthesize into an alignment report Create draft vision plan and recommendations (Public Meeting #2); summary memo Draft a final vision plan (Public Meeting #3) Provide final plan documentation 	<ul style="list-style-type: none"> Van Aken District (landscaping plan) Cleveland Heights-University Heights School Master Plan Southwest Bexley Master Plan & Implementation Bexley Public Library Site Improvements Master Plan Crocker Park (Master Plan) Columbus Creative Campus Plan & Implementation Columbus College of Art & Design Framework Plan Upper Arlington School District Planning & Design 	\$75,190 <ul style="list-style-type: none"> Does not include development of a project identity or kickoff speaker series 	August 2019 (7 months)	<ul style="list-style-type: none"> Provided a facilities map for all three entities Detailed project approach on pages 21-22

Team Members	Project Manager	Approach	Previous Projects/Experience	Fee	Anticipated Completion Date	Comments/Questions
Weber Murphy Fox (Lead) CBLH Design Burges & Burges	David Thal	<ul style="list-style-type: none"> • Assessment and documentation of existing conditions • Creation of focus groups, surveys, and research • Information consolidation • Visioning initial findings • Public outreach • Consolidation of public input • Composition of a final visioning report 	<ul style="list-style-type: none"> • Bethel Park new high school • Peters Township SD new high school • Erie County Blasco Library Children’s Area expansion • Allegheny College Pelletier Library (renovations) • Ross Township Municipal Complex (Cost-benefit analysis for renovations of existing facility vs. construction of new) • Crawford County Government Reorganization • University Heights Library Addition and Renovation • Cuyahoga Falls Public Library – Master Plan Study 	\$122,500 <ul style="list-style-type: none"> • Does not include development of a project identity or kickoff speaker series • Conducting Council, Committees, and Boards meetings is not specified 	October 2019 (9 months)	<ul style="list-style-type: none"> • Current consultant for the City of Shaker Height’s Space Study and Plan for City Hall
Enlightenment Consulting Group, LLC (Lead) Dimit Architects	Peter Whitt	<ul style="list-style-type: none"> • Establish understanding of baseline vision plan ideas and resources • Modify scope based on feedback and data • Development an engagement strategy to support internal and external communication • Explore creative alignments between the entities • Research financial data to ensure feasibility of plan • Finalize vision plan 	<ul style="list-style-type: none"> • Cleveland Public Library Community Vision Plan • City of Cleveland Racial and Ethnic Relations Report 	\$40,000 <ul style="list-style-type: none"> • Does not include development of a project identity or kickoff speaker series • Conducting Council, Committees, and Boards meetings is not specified 	October 2019 (9 months)	<ul style="list-style-type: none"> • Provided a firm profile (page 2), but no individual profiles for project team

ORDINANCE NO.

BY:

Authorizing a contract with Planning NEXT in the total not-to-exceed amount of \$52,780 for professional personal services to serve as facilitator for the Coordinated Facilities Vision Plan Phase 1, and declaring an emergency.

WHEREAS, the City, Shaker Heights City Schools and the Shaker Heights Public Library have agreed to share the funding of a facilitator for the Coordinated Facilities Vision Plan; and

WHEREAS, the project has two phases: Phase 1) Visioning, and Phase 2) Physical Space Study and Master Plan; and

WHEREAS, a request for proposals for Phase 1 was issued on November 19, 2018, and Planning NEXT submitted a proposal on December 17, 2018 for professional services to serve as facilitator for the Coordinated Facilities Vision Plan; and

WHEREAS, the proposal of Planning NEXT has been determined to offer the best proposal and also meets the budget requirement; and

WHEREAS, the Director of Planning has recommended the acceptance of the proposal properly submitted by Planning NEXT in an amount not to exceed FIFTY-TWO THOUSAND SEVEN HUNDRED EIGHTY DOLLARS (\$52,780) for professional services to serve as facilitator for the Coordinated Facilities Vision Plan.

NOW, THEREFORE, BE IT ORDAINED by the Council of the City of Shaker Heights, State of Ohio:

Section 1. This Council hereby accepts the proposal of Planning NEXT for professional personal services to serve as facilitator for the Coordinated Facilities Vision Plan Phase 1 in an amount not to exceed FIFTY-TWO THOUSAND SEVEN HUNDRED EIGHTY DOLLARS (\$52,780).

Section 2. The Mayor is hereby authorized to enter into a contract with Planning NEXT for such professional services. Said contract shall be in the form as approved by the Director of Law.

Section 3. This ordinance is hereby declared to be an emergency measure necessary for the immediate preservation of the public peace, health, safety and welfare for the reason that it is necessary in the current operation of City and, in order to meet the project deadline, therefore, this ordinance shall take effect immediately upon its enactment and approval by the Mayor.

Enacted _____.

Approved this ____ day of _____ 2019.

DAVID E. WEISS, Mayor

Attest:

JERI E. CHAIKIN
Clerk of Council
coun19/0123PlanningNEXT