



Purchasing Department

DATE: May 3, 2021

TO: Judge Gravell
Terry Cook, County Commissioner Precinct One
Cynthia Long, County Commissioner Precinct Two
Valerie Covey, County Commissioner Precinct Three
Russ Boles, County Commissioner Precinct Four

FROM: Joy Simonton, Purchasing Agent

RE: Williamson County Strategic Plan Consulting Services Procurement Overview

In response to the Commissioner's Court request to provide framework as to how to solicit and contract for Strategic Plan Consulting Services, I offer the following overview and recommendations.

Planning services are considered a unique category and do not require a competitive bid, meaning price can but is not required to be an evaluation factor. However, notice of the consulting opportunity must be given and fair and open competition is required (Tex. Gov't Code Sec. 2254.022 (b) (3))

<https://statutes.capitol.texas.gov/Docs/GV/htm/GV.2254.htm>.

In this setting, the Commissioners Court would be well served to know the market by issuing a solicitation and select a consultant based on the most qualified respondent. A Request for Qualifications (RFQ) is the recommended solicitation method for the Strategic Plan Consulting contract being considered.

An RFQ provides maximum flexibility in scoping and contracting. A high-level overview of the recommended process is provided herein:

- Create scope of work;
- Determine scoring criteria on 100 point scale;
- Determine selection committee;
- Advertise RFQ opportunity;
- Receive responses;
- Evaluate responses;
- Determine short list for interview purposes;
- Interview short-listed candidates;
- Make final selection;
- Negotiate contract;
- Begin Strategic Planning project

Once selected, the Court will then negotiate with the consultant to establish a reasonable fee based on the scope of work. If a satisfactory contract cannot be reached with the most highly qualified respondent the Court shall discontinue negotiations with that respondent and move on to negotiations with the next most qualified respondent until a contract is entered into or no award is made.

The solicitation and contracting process can be expected to run 12-16 weeks from the advertising date. In my experience a contract of this scope will cost between \$100,000 and \$200,000. I'm basing this estimate on my general understanding of the scope at hand and my many years of procuring consulting services in the public sector.

The existing Williamson County Strategic Plan, established 2010, is a part of the FY 2021 Budget Document, page 36, and Appendix pages 222 through 268. The document can be viewed at this link: [FY21 Annual Budget Report.pdf \(wilco.org\)](#).

Tarrant County, Parker County and Dallas County Strategic Plan documents are also provided for reference. These documents provide additional line of sight as to what a final plan deliverable can look like. Links to those documents are provided below.

Tarrant County Strategic Plan 2014-2020

[https://www.tarrantcounty.com/content/dam/main/administration/2014 Strategic Plan 6-25-14.pdf](https://www.tarrantcounty.com/content/dam/main/administration/2014_Strategic_Plan_6-25-14.pdf)

Parker County Strategic Plan 2019-2021

<https://www.parkercountytx.com/DocumentCenter/View/6321/strategic-plan>

Dallas County Strategic Plan 2007-2017

<https://www.dallascounty.org/Assets/uploads/docs/comcrt/DallasCountyStrategicPlan.pdf>

At this time staff seeks direction as to how to proceed. If direction is to issue an RFQ, draft RFQ language is included with this submittal to begin the scoping review.