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Research, Planning and Management Consultants
Specializing in Theatre since 1981

PREPARING TO UNDERTAKE A FEASIBILITY STUDY FOR A COMMUNITY CULTURAL CENTRE

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1.0 WHAT IS A FEASIBILITY STUDY?

The feasibility study is essentially a thoroughly researched business planning document. It is usually commissioned by a not-for-profit client group to determine the best option for delivering a community service.

When an organization is considering a facility development project, a feasibility study is often required by governing bodies and prospective funders as a matter of due diligence. A methodical planning process facilitated by independent expert consultants can mitigate the risks involved with a potentially significant capital expenditure.

There are several circumstances that prompt a facility-oriented feasibility study:

- An existing cultural provider is seeking to upgrade or move premises;
- An emerging cultural provider is seeking a home for cultural activities, or;
- The stewards of an historic building are seeking a new use or cultural program for the building.

The study process is slightly more complicated when the focus is on an emerging cultural provider or a building in search of a use, but all feasibility studies should begin with a Market, Needs and/or Business Feasibility Study that identifies the preferred programs, assumptions and conditions of the planning process.

A program or business development process is likely to require the following sequence of feasibility studies:

1. Market, Needs and/or Business Feasibility Study
2. Architectural Feasibility Study
3. Fund Raising Feasibility Study

The studies may be done independently by different types of consultants, or the first two may be combined in a Business/Architectural Feasibility Study and commissioned from a consulting team of management consultant(s) and architect(s).

The market, needs and/or business feasibility study is a preliminary study to define or test a program development concept. Once the program and business plan or growth plan is researched, defined and described, it may have implications for facility development. With a well prepared program brief, the client group may proceed to undertake an architectural feasibility study. When the potential scale and scope of the project has been defined by building professionals, the operating implications should be revisited, together with financing options. Finally, the fund raising feasibility study develops and tests the case for support by sharing the program and architectural proposal with potential donors to determine an achievable fund raising goal.

Each of the feasibility studies should be managed by objective consultants specializing in planning, management, design and operations of the facility in question – whether it is a theatre, art gallery, artist-run centre or community cultural centre. Restoration, or adaptive reuse, requires another level of expertise in heritage preservation practices.

In the best interests of the philosophy “form follows function,” it is recommended that an arts planning or management specialist should be the first consultant engaged in the process. It is likely that they will bring the greatest degree of expertise and objectivity to the questions of whether a building project may be warranted to deliver or expand artistic programming in a given community

environment. They should help you take a hard look at whether your organization will have the capacity to sustain a new or expanded facility. And, typically, the planning or business management consultant can help keep a project focused on mission and organizational capacity when it is in danger of being seduced prematurely by design possibilities or a particular site.

Each project or potential project is unique and has its specific requirements, but a comprehensive Business/Architectural feasibility assessment should be led by a business planning consultant and address the following areas:

- a. Needs and Market Assessment
- b. Activity or Use Program
- c. Facility Analysis (including a preliminary space or building program)
- d. Resource Analysis (including capital and operating cost implications)
- e. Synthesis and Action Plans

Depending on the potential scope of the project and the amount of original research, detail and design development required by the client, the cost of the study can range between \$35,000 and \$250,000. More commonly, theatre feasibility studies cost between \$50,000 and \$100,000. The most experienced consultants can provide the client with a valuable process and constructive document for that price range.

On the following page is a list of the subjects which may be covered in a comprehensive business and architectural theatre feasibility study.

1.1. A Theatre Business/Architectural Feasibility Study Outline

The following components, details and order may change according to the nature and scope of the project and the capacity or requirements of the client group.

A. NEEDS AND MARKET ASSESSMENT

1. Background on the Organization/Characteristics of the Community and Local Activity Data
2. General Trends, Situation Analysis
3. Evaluation of Organizational Capacity
4. Supply Data (Inventory of competitive or complementary facilities)
5. Supply Data (Inventory of competitive or complementary activities)
6. Demand Data (Community demographics - the audiences or customers)
7. Demand Data (Prospective user groups - the artists or clients)
8. Evidence of Community Needs – Political, Real and Perceived
9. Market and Needs Analysis, Business or Program Growth Projections
10. Summary and Preliminary Program Suggestions

B. PROGRAM ANALYSIS

1. Proposed Mission and/or Goals
2. Use or Activity Program, Policies, Management Conditions, Events Calendar
3. Design Criteria, Site Selection Criteria or Preservation Philosophy
4. Outline Building or Space Program – Functional Area Requirements
5. Design Brief (instructions to the Design Architect undertaking the Facility Analysis)

C. FACILITY ANALYSIS

1. Existing Condition Assessment or Site Options
2. Space Adjacency Schedule and/or Plot
3. Schematic Drawings – in plan and section
4. Furniture, Fixtures and Equipment Requirements
5. Optional Renderings

D. RESOURCE ANALYSIS

1. Capital Cost Estimates
2. Funding Options
3. Ownership/Governance/Management Options
4. Operations Plan
5. Annual Budgets
6. Economic Impact Analysis

D. SYNTHESIS PHASE

1. Action Plan
2. Critical Path, Gantt Chart (and/or cash flow projections)
3. Preliminary Terms for Property Acquisition or Preparation
4. Management Organizational Structures and Job Descriptions
5. Project Management Plan and Design Team Selection Guidelines

2.0 PREPARING TERMS OF REFERENCE FOR YOUR FEASIBILITY STUDY

Planning and Technical Bulletin

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Introduction

How does your organization determine the feasibility of a proposed project? How do you inform consultants about the scope of work that you would want accomplished in your feasibility study? The answer to both of these questions is found in preparing Terms of Reference.

Terms of Reference are a specific set of ordered instructions that clearly indicate to a consultant the issues that should be addressed in your feasibility study.

These detailed guidelines will document your group's expectations of the feasibility study.

Terms of Reference are also:

- The basis upon which consultants prepare proposals and estimate the cost of their services to you; as such, these Terms should form part of your contract with consultants.
- The information that you provide to granting agencies to enable assessment of your application according to grant criteria.
- The means by which your study team will monitor the progress of the study.

Terms of Reference should cover all aspects of the study such as the scope, data needs, analysis and recommendations. They also include information on the management of the study and the final presentation format you require for the study.

Role of the Study Team

Once the need for a planning study has been established, a study team begins the task of defining the purpose of the study, obtaining community support for the study and locating the financial and professional resources needed to carry out the study. However, often the most demanding job of the study team is to write the Terms of Reference for the study.

The process of writing the Terms of Reference is the only way that a study team can effectively manage the production of the study. Too often, a group undertakes a study and hires a consultant before they are sure of what they need. Hence, they usually receive a study that satisfies someone else's expectations.

Who Uses the Terms of Reference?

The consulting firm which you contact needs very specific Terms of Reference in order to be able to prepare a proposal on how they would carry out the study and to estimate accurately what the study will cost to produce.

The sources of funding need to know exactly what your proposed study will involve in order to determine if it is eligible for funding.

Carefully prepared and appropriately detailed Terms of Reference will help you and the other study team members to monitor the progress of the study. They will also help you to evaluate the work during the preparation of the study, the final draft stage and when the final report is complete.

How to Use this Checklist

This checklist will help you and your study team to prepare complete Terms of Reference. All of the items on this list should be addressed in the Terms of Reference whether your community is small or large. If you answer "no" to any of these questions, it means that something has been left out and that you should think about how to add this particular item to your Terms of Reference.

This checklist is to help ensure the clarity and completeness of your Terms. It is not intended to expand the scope of your study and, hence, increase its cost.

2.1. A Checklist for Terms of Reference

Background/Rationale

1. Have you provided necessary histories and descriptions of your organization and/or community relating to the feasibility study?
2. Have you provided a description of the issues, problems or special circumstances facing your community or organization that made you decide to do a feasibility study?

Purpose/Objectives

3. Have the goals for the planning study been determined? If various groups are involved, have their own particular needs been resolved in relation to a consolidated set of goals so that any potential conflicts that may occur when the study is underway have been alleviated? If no, is this resolution to be part of the scope of the study?
4. Are these goals written in a clear and readily understandable manner so that they are comprehensible by all the members of the study team?

Scope/Constraints

5. Are the geographic boundaries of the study area outlined?
6. Is a time table for the study sketched out including proposed target dates for meetings with the consultants; preparations of draft and final reports; public meetings and any other significant stages in the completion of the study?
7. Have you asked the consultants to provide a flow chart or its equivalent indicating the dates mentioned in the preceding section and other key events in their proposal?
8. Have you asked that sufficient time be allowed for review of the draft final report by funding agencies?
9. Have you stated what materials your organization or agency will provide to the consultants?
10. Have you asked that operating budgets and capital costs be broken down so that the components that constitute these estimates can be analyzed?
11. Have you asked that operating costs be projected for a five year period?
12. Have you identified any areas of your community or of your operation, administration or facility which need special attention?

Information Required

13. Describe the information that you expect will be needed to meet the objectives of the study. Have the following items been considered?

- Social and economic characteristics of the community and/or user groups (age, income, sex, occupation, etc.);
- An investigation of needs or the demand for the particular facilities in question;
- Inventory of existing programs, facilities that are relevant to the feasibility of the proposed facility;
- Capital, operating and maintenance costs and revenues of existing facilities as they pertain to the change or establishment of a facility;
- The administrative structure of departments and agencies that provide cultural and recreational services that affect the project under investigation;
- Review and analysis of existing pertinent reports and studies;
- A review of programs and technical advances now in place to illustrate the state-of-the-art, for situations in Canada or elsewhere;
- Compatibility of any proposal or alternative proposal with the local neighbourhood. Have general environmental concerns been noted if applicable?

14. Have you explained how the information is to be used in the study once it is collected?

For example, will these steps be required:

- Data analysis based on community needs and financial capability;
- Prioritizing of recommendations;
- Financial implications of each recommendation;
- Proposed implementation of each recommendation;
- Support of recommendations by logical argument and background information?

15. Have special situations in the study been noted?

For example:

- Historical building evaluation requires reference to pertinent standards and documentation techniques;
- Museum suitability requires reference to pertinent provincial standards;
- Performance standards require indication of need for theatre, acoustic, landscape or other specific research consultants.

16. Has information about the availability of grants been requested?

Community Participation

17. Have you stated who should be involved in the study?

Have the following groups been considered:

- Elected and appointed representatives,
- Public agencies and institutions,
- Local community and special interest groups,
- Service clubs,
- Facility board members,
- Staff and volunteers,
- The general public?

18. Have you described how the community is to be involved in the study?

Have the following methods of involvement been considered:

- On the study team,
- On task committees,
- Through public meetings,
- Through the submission of proposals and briefs,
- Through public surveys,
- Through an education or public relations process using newspaper, radio coverage and other means,
- Through analysis of already compiled information?

Roles and Responsibilities

19. Have you indicated who is to do all or portions of the study? Have you given reasons for these preferences?

20. Have the tasks that each party will be doing been outlined?

For example:

- Arrange and conduct meetings;
- Carry out specific tasks;
- Prepare and distribute surveys;
- Conduct interviews;
- Analyze data, co-ordinate information from involved sectors;
- Prepare recommendations;
- Write the final report, prepare graphic material;
- Publish study and distribute copies of the study?

End Use of the Study

21. Have you described what status the study will have upon completion? Is it clear who will use the results of the study and when?
22. Have the required format and number of copies for the draft final and final reports been specified? Will printing be included in the study cost? Have all special presentation requirements been outlined?

General Notes on Writing Terms of Reference

- Terms of Reference should be written in a directive style, i.e. "The consultants will...", "These areas should be studied...".
- Details on who will be responsible for what and how disputes will be solved need not be covered in the Terms of Reference. They will, however, be part of the legal contract eventually drawn up with the chosen consulting firm.
- Terms of Reference should convey that you are interested in obtaining the very best advice available. A consultant must at all times be directed to keep the best interests of a community in mind and to put those forward regardless of the no doubt very strong community or group aspirations with which they are confronted.
- A feasibility study examines alternative ways of resolving an issue. The Terms of Reference need to show that you require careful consideration of alternative courses of action and not an abrupt "leap to a conclusion".

2.2. A Process Overview

Part I: Background/Goals

Your group should:

- Provide background information on your organization, community and reasons for the feasibility study.

Part II: Needs Assessment

Ask consultants to:

- Identify who currently supplies similar programs. Are there gaps? Who is your client/audience?
- If there is a need, proceed. If there is no need, then what?

Part III: Programming/Administration

Ask consultants to:

- Identify what types of programs and services are required to meet the need.
- Identify what the staffing options are.
- Identify what is recommended.
- Identify what standards must be met.

Part IV: Preliminary Space Requirements and Location

Ask consultants to:

- Identify what the options and recommendations for location are.
- Identify what size and type of facility is required.
- Identify what type of space breakdown is recommended.

Part V: Financial

Ask consultants to:

- Identify what are the capital and operating costs.
- Identify who will provide capital and operating dollars.
- Recommend if it's feasible

Part VI: Implementation

Ask consultants to:

- Identify how and when the study recommendations will be implemented.
- Identify who will implement what recommendations.

Part VII: Study Management

Your group should:

- Identify what roles the study team and consultants will play.

How to Write Terms of Reference

The study team, which is established by your organization, is responsible for writing the Terms of Reference for your feasibility study.

Note: For further information on developing a study team, see Feasibility Studies for Community Facilities, Toronto: Ontario Ministry of Citizenship and Culture, 1982.

Your Terms of Reference will be unique to reflect your community and proposed project. However, the subject areas or categories of your terms will be consistent with the ordered process, indicated in the flowchart which follows. Ensure that your instructions to consultants are always made in a directive manner (i.e. review, identify, recommend, list, outline) in each category.

2.3. A Draft Framework for Terms of Reference

Instructions

The following planning guidelines have been assembled in an effort to assist your group in the process of preparing Terms of Reference. By responding to each of these questions, your group will have established a first draft of the Terms of Reference for your feasibility study. It should be noted that these guidelines only represent the minimum requirements in preparing terms of reference and do not necessarily cover all aspects of a particular study. Further, they do not necessarily reflect the sequence in which prospective consultants will respond in a given proposal.

Part I: Background

In order to provide the consultant with sufficient background respecting your project, review and answer questions 1, 2 and 3.

1. **Q:** What do we know about our community's history and its social, economic and demographic make-up that will serve to place our proposal into context? What organizations are represented on our study team?

Example: "Municipality 'X' is situated . . . with an estimated population of . . . , etc...."

A:

2. **Q:** What do we know about our organization's/facility's/project's history that will serve to place our proposal into context?

Example: "Organization 'M' was created in . . . with a board membership of . . . to . . ."

A:

3. Q: What are the specific community issues and circumstances which can be identified as having some effect on our proposal?

Example: "Facility 'Y' burned down or facility 'Z' is too small for its proposed use."

A:

Goal of the Study

Questions 4 and 5 will essentially provide the consultant with information respecting your group's overall expectations of this study.

4. Q: What do we want to learn about our proposed project that will help us to better plan its successful implementation and operation?

Example: "To determine the feasibility of establishing an art gallery for community 'X'."

A: The goal of this study is to:

5. Q: How can we break our study goal down into a series of parts that will assist our consultant in understanding our project and in preparing a detailed proposal?

A: These categories will include needs assessment, programming and administration, preliminary space requirements, financial considerations, an implementation plan, prioritized recommendations and other categories unique to your project type.

**Part II:
Needs Assessment**

- 6. Q:** Are there related plans and studies which have been conducted in the past that the consultants shall review in assessing need?

Example: "The consultants shall review existing community plans, round table reports on multi-cultural association 'X', society charter, etc... in order to illustrate past needs and project trends."

A:

- 7. Q:** Can we identify anyone else in our community who presently offers similar or related services who we would want our consultant to interview?

Example: "The consultant shall meet with representatives from the historical society, museum 'Y', the boys and girls club, girl guides, etc...."

A: List:

- 8. Q:** Can any gaps in the provision of existing programs be identified by the consultants? (Describe the level of detail that you expect the consultant to provide.)

Example: "The consultant shall identify the present level of user satisfaction with current library circulation services."

A:

9. **Q:** Can solid, broadly based community support for our project be demonstrated? For what market segment does the proposed project have the greatest appeal/support? (Ask the consultant to provide a methodology to ensure this, at a level of detail that satisfies your group.)

Example: "The consultant is to conduct a random sample of the local community to assess the need for a new community theatre."

A:

10. **Q:** Can definitive need for our project be demonstrated by the consultants' findings?

Example: "Based on the methodology and information gathered in tasks five through eight, the consultant shall recommend whether or not there is a need for a new native community centre."

A:

Notes: **If need can be demonstrated at this point, then the study can proceed to examine alternative options.**

If definitive need cannot be demonstrated, the proposal must be carefully reassessed and the consultant should be requested to provide recommendations outlining a course of action.

**Part III:
Programming/Administration**

The information gathered in this category will establish a context for the development of the facility (Part IV) and related costs (Part V).

11. Q: What level of detail regarding the types of programs should the consultants provide?

- Example:
- (a) "The consultant shall list all potential programs that would be offered by the art gallery to meet the defined needs of the community."
 - (b) "The consultant shall recommend hours of operation for the library."
 - (c) "The consultant shall identify types of extension services by community museum 'X' to meet the defined needs."

A:

12. Q: What does the consultant recommend as the most effective and efficient approach to administering the proposed facility?

- Example:
- "The consultant shall recommend the number and types of staff positions required for operation of the proposed native cultural centre."

A:

Part IV:
Preliminary Space Requirements and Location

The information outlined in this category will provide an overview of anticipated facility space requirements and pertinent location factors.

- 13. Q:** In view of the consultants' findings, what would be the most appropriate size of facility and the related space components?

Example: "The consultant shall determine the most appropriate size of the addition to citizenship facility 'Y' and the space program for the addition based on projected programs and the number of users."

A:

- 14. Q:** In specific circumstances, location factors are essential to determining feasibility. What should the consultant consider in the recommendations respecting location?

Example: (a) "The consultant shall develop criteria upon which location is to be assessed."

(b) "The consultant shall review locations A, B and C to recommend the most suitable location for theatre 'X'."

A:

**Part V:
Financial**

Information in this category will provide answers on the financial viability/feasibility of your project.

15: Q: According to the consultant, what are the estimated capital costs?

Example: "The consultant shall project the capital costs of facility 'X'."

A:

16. Q: According to the consultant, what are the projected operating costs (over a five year period)?

Example: "The consultant shall project operating costs over a five year period for museum 'P', noting the operating budget categories of the provincial operating grant program."

A:

17. Q: According to the consultant, what are the potential sources of operating dollars?

Example: "The consultant shall outline potential sources of operating revenue, including an identification of potential entrepreneurial activities for library 'C' for internal revenue generation."

A:

18. Q: How can the consultant justify whether or not the project is financially feasible?

Example: "The consultant shall list all assumptions upon which projections are based for cultural centre 'B', which state the project is feasible."

A:

Part VI: Implementation

The information in this category will assist your group in successfully implementing your project.

19. Q: What is required to effectively implement the project?

Example: "The consultant shall provide a series of prioritized recommendations defining required roles and responsibilities with a timetable for the new library of community 'X'. The consultant shall identify future planning required for this project."

A:

**Part VII:
Study Management**

Information in this category will outline "who is responsible for what" in the process of managing your study.

20. Q: Have you clearly indicated who is to be responsible for:

- Arranging and conducting meetings?
- Designing and administering survey questionnaires?
- Conducting interviews?
- Coordinating the information collection process and compiling resultant survey statistics?
- Printing and distributing interim, draft and final written reports? (Have you indicated how many copies of each will be required?)
- Establishing a study timetable? (Have you ensured that sufficient time has been allocated in the timetable for adequate review by all funding agencies?)
- Final presentation of the draft final report to all interested parties (i.e. public agencies)?

A:

21. Q: Have you ensured that the level of detail that you are requesting is consistent with both the necessary information you require to make a final decision and your budget?

A:

3.0 HOW TO SELECT A PLANNING CONSULTANT

This Bulletin reviews techniques for selecting a consultant. Because planning projects vary, no one method or check-list can cover all your requirements, so adapt these techniques to fit your needs.

Choosing the right consultant is important. Along with effective Terms of Reference, it is the best way to avoid major planning-study problems such as:

- Incomplete work
- Delays
- Unnecessary or unusable work
- Extra costs
- Conflicts between individuals or groups in the community
- Poor use of your skills or the consultants' skills
- Community-wide dissatisfaction with study results
- Recommendations that cannot be implemented

Understand the steps for forming a working relationship with a consultant so that problems are solved, not increased. Here are eight questions to ask when selecting a consultant:

1. What is our task?
2. Do we need help?
3. Can we afford it?
4. Who can help?
5. What will they do for us?
6. Who can do the best job?
7. Can we get along with them?
8. Are we ready to start?

GETTING READY – WHAT TO DO BEFORE LOOKING FOR A CONSULTANT

1. What is our task?

Agree on the purpose of the study and write it down.

The Terms of Reference for a planning study establish the purpose of the study. Just as the charter of an organization sets out its goals and objectives, the Terms of Reference set out the goals of the planning study. Ensure that they include an honest description of the problem from the viewpoints of all key parties involved.

2. Do we need help?

Determine if outside assistance is needed to solve the problem.

Look to local resources first. If the skills, abilities and time to do the job are available through agency staff or organization members, seek their co-operation first. However, guard against unintentional biases affecting the study results.

You may need specialized knowledge, communication skills, previous experience with similar situations, analytical techniques, an unbiased view, or other talents not available to you. In these cases it will be worthwhile to bring in a professional consultant.

3. Can we afford it?

Secure funds for the study.

Your budget for a feasibility study or master plan should be geared to the size of the capital or program expenditures that you are trying to decide upon. An under funded feasibility study or master plan will not lead to successful facilities or services. Do not go looking for bargains.

Obtain funding commitments covering the estimated study cost before beginning the search for the consultant.

THE CALL FOR PROPOSALS – FINDING THE RIGHT CONSULTANT

4. Who can help?

First, identify firms that are qualified and interested in your study.

There are a wide variety of consultants in Ontario - planners, architects, engineers, specialists on museums, libraries, theatres, heritage buildings and others. Some may be located in your community. To find firms with the ability to meet your needs, use:

- Personal recommendations - contact your associates who may have used consultants for a similar problem in the past. Ask for their recommendations.
- Lists of consultants - contact professional organizations for lists of their members. These lists often indicate specialties though they do not evaluate the service provided. Check references.
- Advertise - especially in the case of large or unusual projects, it may pay to place ads describing your study and ask interested firms to contact you.

As a result of this search you may have a large number of interested firms. At this point it is wise to narrow the field down. To develop a short list of the most suitable firms, request that they send you brief and general information about their experience and expertise:

- Backgrounds of personnel.
- Length of time in practice.
- Experience in the field related to your situation.

This step is sometimes called pre-qualification or a Request for Qualifications (RFQ). It will help you to identify those firms that you will be asking to prepare detailed proposals.

5. What can they do?

Send out your request for proposals.

The request for proposals is your formal request to a limited number of consultants to describe in detail how they intend to carry out the study. This proposal call usually consists of a covering letter and the final version of the terms of reference. The proposal call is issued to at least three firms that appear qualified to assist you.

Make clear to the consultants in the terms of reference or in the covering letter what information you would like to see in their proposals. The proposals are to respond to the terms of reference. They must show how the firm would approach and carry out the study. In addition they should contain:

- A timetable and study management plan showing the proposed phases of the work program, documentation, and meetings. This should include any suggested revisions to the terms of reference, and an explanation of the reasons for the suggested changes.
- Name, qualifications, position in the firm, and experience of the staff to be assigned.
- An estimate of the number of days that each member of the consulting team will spend on the assignment.
- Maximum total cost for the assignment and cost breakdown such as:

1. Data collection
 2. Analysis
 3. Draft document
 4. Final document cost
 5. Meeting - public, council, government agencies
 6. Printing cost (with number of copies specified), disbursements
- Examples, or a list of those available for review of planning documents prepared by the key personnel to be employed on this project.

Allow enough time for the consultants to prepare proposals. Telephone confirmation of delivery of documents at all stages can avoid delays. Indicate in the covering letter the due date, contact person and any other relevant details as shown above.

EVALUATING PROPOSALS

6. Who can do the best job?

Set up selection criteria and use them to evaluate all proposals.

While the consultants are preparing their proposals, your committee will be at work determining how to judge them. It helps to list the qualities that you are looking for. Writing down the evaluation criteria assists the study team to make a better selection.

The selection criteria define the abilities that are important for completing the study to your expectations. The emphasis that you place on each criterion will depend on your needs. These criteria will probably fall within the following two categories:

FIRM AND STAFF ASSIGNED TO THE STUDY

- Previous experience or performance in similar studies and in this community.
- Professional reputation of firm.
- Reference from previous clients, especially for similar studies.
- Ability to initiate and complete study within your time frame.
- Philosophy on study topic - their approach.
- Freedom from conflict of interest.
- Quality of previous work.
- Qualifications and experience of consulting team slated to work on projects.

PROPOSAL

- Quality of proposal - comprehensiveness, organization, writing style, length, presentation.
- Approach to the study - has the consultant identified the key issues for the study? Does their proposal show how they think it should be undertaken?
- Is it "on-track" with the terms of reference?
- Is the firm's prepared method of public input into the study innovative and suitable?
- Does it emphasize one aspect of the study more than it should?
- Fees and proposed schedule of payment.

7. Can we get along with them?

Meet the consultants to see if a good working relationship can be established.

Interviews with consultants after you have reviewed their written proposals help to establish professional compatibility with your committee. In addition to the written proposal, the personnel that are being assigned to the study are important to your decision. You must meet, preferably in private, with the members of the firm that will be working on the study.

Interviews are usually held individually with each firm. Sufficient time should be allowed for a presentation by the consultant and questions from the committee. You may wish to use a prepared list of questions so that each consultant addresses the same issues.

Selection criteria used during the interview will consider the following areas:

- Satisfaction with the consultant's response to your questions about the firm, its staff and proposal.
- Knowledge about the community, personal contact with the staff, council or study team, site visit to area, evidence that they have given additional thought since their proposal to this study.
- Will you be able to work easily with the consultant?

MAKING THE DECISION

8. What is the next step?

Select your consultant and prepare a contract.

After the committee has made its decision, you will need to obtain approval from council, your organization, or other funding sources, as necessary.

In order to assist you in this, it will be helpful to have a short summary covering the selection process showing:

- Who was involved in making the selection.
- Names of firms submitting proposals.
- Selection criteria used.
- Reasons for selection.

This will be especially useful if the lowest cost proposal was not selected. Price is an important selection criterion, but remember that purchasing professional services is different from purchasing materials. For planning services, the ability of the supplier is a more important guarantee of value for money than the lowness of their fee. All professional associations discourage or do not permit their members to engage in fee competition. Price must be a part but should not dominate the selection decision.

As a matter of courtesy, inform the other firms that they were not selected. You may be asked why their proposal was not selected.

Your next step will be to enter into a contract for services with the consultant. This is a matter for your solicitor.