



Scope of Services
Public Meeting Facilitation for Small Area Plans

SECTION 1 – INTRODUCTION

The District of Columbia Office of Planning (OP) seeks proposals for public meeting facilitation services for Small Area Plans. OP seeks the professional services of a highly qualified consulting firm or team of firms (Contractor) to perform work in the area of public meeting facilitation. The Contractor must demonstrate a track record in public meeting facilitation for neighborhood planning activities, both in person, and using online platforms, as well as the ability and capacity to complete tasks and deliver work products within the defined schedule. Contractor should demonstrate familiarity with different neighborhood dynamics particularly as they relate to planning policies, anticipating potential points of contention.

OP Background

OP is responsible for the District’s city planning functions, including: maintaining, updating, and monitoring implementation of the District’s Comprehensive Plan, which sets forth a 20-year vision and blueprint that guides land use and programmatic decision-making for development in the District; Small Area Plans and studies that supplement the Comprehensive Plan, providing detailed guidance tailored to address specific needs of neighborhoods and transportation corridors; strategies targeting citywide issues such as retail and the creative economy; zoning as a fundamental land use policy implementation tool; and system plans in partnership with sister agencies. The role of OP is to be the steward of these plans, ensuring that development within the District is in line with these plans and with District policies and priorities. Additionally, owing to the District’s city-state structure, the Office of the State Historic Preservation Officer (SHPO) and the State Data Center are ensconced within OP, and are responsible for all historic preservation regulatory and policy-making functions, and for demographic forecasts and other growth projections, respectively.

Project Background

Small Area Plans (SAPs) cover defined geographic areas that require more focused direction than can be provided by the Comprehensive Plan. The intent of such plans is to guide long-range planning and development that supports and improves neighborhoods, achieves District-wide goals, and attains economic and community benefits. SAPs entail significant community outreach and engagement, to both communicate the goals and milestones of the planning process as well as provide opportunities for community dialogue on important topics of the plan. OP is in the process of developing a new series of SAPs, having an emphasis on recovery, equity, and housing affordability.

SECTION 2 – SCOPE OF WORK

OP is undertaking three planning processes in Chevy Chase, Pennsylvania Ave SE, and Congress Heights. These SAPs will be centered around three main themes from the Comprehensive Plan Update; 1) COVID-19 Response and Recovery, 2) Housing, and 3) Equity and Racial Justice. The Contractor shall provide public meeting facilitation and mediation for these three plans. In addition to meeting facilitation and mediation, Contractor will participate in designing and implementing large and small group multi-stakeholder processes that combine stakeholder engagement and education. Contractor should employ processes designed and managed to be fair, transparent, and culturally competent. Up to 10 meetings are expected to each be approximately 1.5 - 2 hours in length and are anticipated to be conducted through online (virtual) platforms, or in person, if the COVID-19 health emergency allows. The meetings may cover contentious topics dealing with neighborhood change and include participants and stakeholders that reflect a diversity of race, class, ethnicity, age, and (digital) literacy levels.

The Contractor shall fulfill the following requirements as part of the meeting facilitation:

1. Provide a project work plan, including a clear schedule for OP's deliverables and resource allocation.
2. Prior to event, review program design and materials for each meeting, prepared in advance by OP. Provide constructive feedback on meeting program and materials to ensure a successful event.
3. Help prepare staff and meeting panelists/presenters via a training orientation session. Provide written tips for dealing with difficult questions/participants and logistical considerations to ensure a successful run of show.
4. Be the lead facilitator for 10 meetings, including moderation of panel/presenters, mediating issues that arise amongst participants, and keeping the program on schedule and on topic.
5. Provide post-meeting feedback in a written one-page summary memo, within one week following the event, including suggestions for improvements for subsequent meetings.

Deliverables

- ✓ *Project Work Plan*
- ✓ *Pre-event planning, program and material review*
- ✓ *Training orientations with staff*
- ✓ *Panel/presenter preparation*
- ✓ *Meeting facilitation*
- ✓ *Post-meeting debrief memo*

Supporting Documents

Item No.	Document Type	Title, Author, Link	Date
1	Event Summary	Continuing Conversation on Housing: How Land Use Policies Impact Housing Opportunity Across the District , DC Office of Planning	2019

		https://housing.dc.gov/sites/default/files/dc/sites/housingdc/page_content/attachments/How%20Land%20Use%20Policies%20Impact%20Housing%20Opportunity%20Event%20Summary%20Final_0.pdf	
2	Event Summary	Continuing Conversation on Housing , DC Office of Planning https://housingdc.dc.gov/sites/default/files/dc/sites/housingdc/page_content/attachments/Community%20Conversation%20Summary.pdf	2019

Important Electronic Document and Map Delivery Standards for OP and its Contractors

The Office of Planning manages spatial information using GIS software from ESRI, and most other data and documents using Microsoft Office 365 Plus for Windows. We use Adobe Creative Cloud 2018.1(CC) for desktop publishing and design. Consultants wishing to exchange maps and data effectively with OP should plan to use ESRI ArcGIS 10.8 or equivalent GIS software. Base mapping data may generally be downloaded directly from <http://opendata.dc.gov>. OP may provide additional base mapping and other data in ESRI geodatabase or shapefile formats; CAD-format data will be provided only for design-related projects or as specified explicitly in the scope of work.

All maps, data, and documents developed for OP must be delivered in acceptable electronic formats. OP prefers maps in ESRI ArcMap or ArcGIS Professional formats; at minimum, spatial information developed for OP should be delivered in ESRI file geodatabase or shapefile formats. Note: key map information must be delivered as geographic features stored in layers; simple graphic elements drawn on a map are not acceptable.) CAD-based maps are acceptable only for design-related projects or as specified explicitly in the scope of work. Highly generalized (“blob”) maps may be delivered in editable graphic formats, but should be derived from OP’s base map information. Maps showing specific location information must be delivered in ESRI ArcGIS-compatible formats.

Other information and documents should be provided in Microsoft Office 365 Plus formats, Adobe Photoshop files using features compatible with Photoshop CC (2018.1), Adobe Illustrator files must be provided in Illustrator CC (2018.1) format, or Adobe InDesign files in CC (2018.1) compatible formats. For Adobe InDesign, deliverables shall be delivered in "package" format together will all required resources including fonts and linked resources in editable format for InDesign CC (2018.1) and an .idml version of the InDesign document. In all cases, data sets must be delivered with sufficient documentation for OP to be able to assess what they contain and to reuse them in subsequent efforts. Use of data delivered to OP should not be limited by third party license restrictions.

Note that OP routinely posts final documents on its website in Adobe Portable Document Format. The maximum acceptable size for attachments on DC Government websites is 10 megabytes. Contractors should be mindful of this limit when designing their documents, and original Adobe Photoshop and/or

Adobe Illustrator files should be delivered together with the Adobe InDesign documents that incorporate them.

Consultants are responsible for printing 5 copies of all required documents and a single copy of all required maps and graphics unless otherwise specified in the scope of work.

All software, database, or website development tasks and any use of non-standard graphics or presentation software must be reviewed by the OP Chief Information Officer. Any cloud-based service use must be reviewed and approved in advance by the OP Chief Information Officer, and administrative control of any cloud-based services procured on OP's behalf shall be transferred to the OP Chief Information Officer, including administrative control of any domain names established for the Office of Planning. Products hosted on any service controlled by or within an account in the name of a contractor shall not be considered to be delivered until they have actually been transmitted to the Office of Planning in full or transferred to a service controlled by and in the name of the Office of Planning.

Any licensed fonts used in deliverables to OP must be provided to OP, together with proof of license from an authorized licensor for up to 5 members of OP's staff to use those fonts to make edits to those deliverables (except for fonts included with Adobe Typekit, Microsoft Windows 10, Microsoft Office 365 Plus, or OP's standard software packages.)

Summary of Deliverables

The Contractor shall perform the activities required to successfully complete the District's requirements and submit each deliverable to the Contract Administrator (CA) in accordance with the following:

Item	Deliverable	Quantity	Format/Method of Delivery	Due Date	Potential Contractor Hours
1	Project Work Plan	1	Word	1 week from NTP	2
2	Pre-event planning, program and material review	10	Email exchange	1-2 weeks prior to each scheduled meeting	30
3	Training orientations with staff	10	Word document and video call	1 week prior to each scheduled meeting	20
4	Panel/ presenter preparation	Up to 10	Word document and video call	1 week prior to each scheduled meeting	20
5	Meeting facilitation	10	Digital Platform or in person	TBD	30
6	Post-meeting debrief memo and call	10	Word document and video call	1-2 days after each scheduled meeting	20

OPTION YEAR

Item	Deliverable	Quantity	Format/Method of Delivery	Due Date	Potential Contractor Hours
1	Project Work Plan	1	Word	TBD	2
2	Pre-event planning, program and material review	10	Email exchange	TBD	30
3	Training orientations with staff	10	Word document and video call	TBD	20
4	Panel/ presenter preparation	Up to 10	Word document and video call	TBD	20
5	Meeting facilitation	10	Digital Platform or in person	TBD	30
6	Post-meeting debrief memo and call	10	Word document and video call	TBD	20

C.7 CONTRACTOR EXPERIENCE/QUALIFICATIONS REQUIREMENTS:

- C.7.1 Demonstrated experience with public engagement and meeting facilitation for a minimum of two projects of similar size and scope. For each project, please include client contact information, contract number, and a copy of the final contract performance evaluation.
- C.7.2 A list of three professional references for similar work performed by your company.
- C.7.3 Resumes showing the qualifications of company employees proposed for this project.

