



Request for Qualifications: Consultant Pool 2017-2019

**Transportation and Land Use Connection
&**

**Wasatch Front Regional Council/Mountainland Association of Governments
Travel Demand and Real Estate Market Models
Model Development Support**

Deadline—December 18th 3:00 PM

Please direct all questions regarding this Request for Qualifications (RFQ) to Megan Townsend, contact information provided below:

WFRC Contact Persons:

Megan Townsend
Transportation Planner
Wasatch Front Regional Council
295 North Jimmy Doolittle Road
Salt Lake City, Utah 84116
Telephone: (801) 363-4230, ext. 1101
E-Mail Address: mtownsend@wfrc.org

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Open Consultant Pool Advertisement Dates

The RFQ will be released on **Monday November 20th, 2017** and available through **Monday December 18th, 2017** on the WFRC website and SciQuest.

Statement of Qualifications Submission Instructions

Each consultant firm will submit a Statement of Qualifications (SOQ) according to the guidelines outlined in this Request for Qualifications (RFQ). Deliver five (5) hard copies by mail and one electronic PDF file of the SOQ via email, or on a flash drive by mail to Megan Townsend, Wasatch Front Regional Council at the address below **no later than 3:00 PM on Monday, December 18th, 2017**. See Submission Instructions in Attachment D. Label by firm and year, ie. "FIRM_2017_SOQ".

Mailing Address

Megan Townsend
Wasatch Front Regional Council
295 North Jimmy Doolittle Road
Salt Lake City, Utah 84116

E-Mail Address

mtownsend@wfr.org

Late Submission is defined as any SOQ received by the Consultant Selection Team after the **December 18th, 2017 3:00 PM deadline**. Late submissions will not be accepted.

The Consultant Selection Team reserves the right to disqualify an application when the intent of the process is not adhered to.

Evaluation Based Selection

This is a qualifications and evaluation based selection process based on the information provided in Appendix A - *Overview of Transportation and Land Use Connection (TLC)*, Appendix B – *Overview of WFRC/MAG Model Development Program*, and Appendix C - *Consultant Evaluation and Selection Process*.

SOQ Content and Formatting

All SOQs submitted should be prepared in accordance with Appendix D - *Guidelines for Preparing a Statement of Qualifications*. If there are any changes affecting the SOQ procedure, notice will be sent out via the consultant services e-mail list.

Evaluation Criteria

SOQs will be compared and evaluated based on the criteria identified in Appendix C.

Consultant Pool Standing

Selected consultants will form a pool of firms that will be available for the Transportation and Land Use Connection and WFRC/MAG Model Development assistance for three years. Project sponsors and partners will utilize consultants on an as-needed basis to complete specific Transportation and Land Use Connection awarded projects or WFRC/MAG Model Development Support needs. Being part of the consultant Pool prequalifies consultants for work within the Transportation and Land Use Connection and WFRC/MAG Model Development Support Pool; eligible consultants will remain in the Pool **until December 2019**. All consultants will have to renew their standing in **November of 2019**. **Consultants already admitted into the pool in February 2018 need not submit an SOQ this year.**

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Transportation and Land Use Connection Project Procurement

The Consultant Pool enables a streamlined procurement process for Transportation and Land Use Connection projects. For projects under \$50,000 the local government may opt to select directly from the Pool or go through competitive consultant procurement. Transportation and Land Use Connection awarded projects over \$50,000 (both TLC resources and cash match) undergo a streamlined competitive consultant procurement process utilizing the Consultant Pool. TLC program administrators will distribute all category Statements of Qualifications to the local government who will then select a minimum of three consultants (up to the entire pool) within the pool project category to receive the Request for Pool Letters of Qualifications (RPLOQ). Consultant invitations are determined based on the local government’s review of the consultant SOQs and the awardee’s project needs. Consultants must be invited in order to submit a Letter of Qualifications for each project. For projects above a \$200,000 total budget threshold, an alternative consultant procurement process may be utilized.

Forms

Examples of Transportation and Land Use Connection projects and RPLOQ forms referred to throughout this SOQ are available on the [TLC website](#).

Consultant Pool 2017-2019 Selection Schedule

| DATE | ACTION |
|-------------------|--------------------------------------|
| November 20, 2017 | RFQ Released |
| December 18, 2017 | SOQs are due to WFRC by 3:00 PM. |
| January 2018 | SOQ Selection Team Meeting |
| February 2018 | Notification of Consultant Selection |

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APPENDIX A

Overview of Transportation and Land Use Connection (TLC)

Appendix A Introduction

The Transportation and Land Use Connection seeks Statements of Qualifications from eligible consultants to form a prequalified pool of consultants to provide planning and technical assistance to local government projects. A variety of consultant expertise is needed to address a wide range of land use and transportation planning related projects for the TLC grant program. The type of consultant technical assistance available will be listed below under the heading “Project Eligibility”.

Program Description

The Transportation and Land Use Connection (TLC) is a joint partnership between Salt Lake County and WFRC. The program’s main objective is to provide technical assistance such as staff time, consulting, and training to local communities for planning, implementation, and visioning efforts that proactively address anticipated growth. The Utah Department of Transportation and the Utah Transit Authority also contribute resources and partner in the program.

The program encourages communities within the WFRC area of responsibility (Box Elder, Davis, Morgan, Salt Lake, Tooele, and Weber Counties) to integrate their land use and regional transportation plans through the use of the Wasatch Choice Vision growth principles. The TLC program focuses on helping local governments develop in a way that works best for them, supporting their efforts to create livable and vibrant communities. Transportation and Land Use Connection utilizes local consultants able to provide the type of specialized assistance needed.

More information about the program and projects can be found here: <http://www.wfrc.org/tlc>

Program Goals

- Help local governments create desired livable communities and focus growth in centers
- Foster a prosperous and livable region as outlined in the Wasatch Choice Vision growth principles
- Encourage coordination of land use plans with existing or planned regional transportation
- Reduce travel demand by enabling shorter commutes, providing more travel choices, and cultivating alternative land development strategies
- Promote multi-jurisdictional collaboration and regional impact
- Support local outreach and engagement efforts that promote broader stakeholder involvement

Project Eligibility

Assistance is available to municipalities, counties, townships, and multijurisdictional groups of local governments within the WFRC area of responsibility (Box Elder, Davis, Morgan, Salt Lake, Tooele, and Weber Counties). The WFRC encourages applications from two or more jurisdictions working together, within county boundaries.

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Eligible projects include but are not limited to:

- Using Wasatch Choice resources and tools like Envision Tomorrow Plus (ET+) to generate land use scenarios for planning purposes
- Projects that involve multi-jurisdictional coordination and regional collaboration
- Activities that help to implement previously-adopted plans, such as revisions to ordinances or other land use regulations
- Assistance with public participation related to developing or implementing local plans
- Site assessments to determine feasibility of projects like transit oriented development project or first last mile strategies
- Studies or specific plans related to important local issues, such as housing, transportation choices, or market studies
- Developing local “visions” or plans

Non-Eligible Projects

Project phases such as land acquisition, engineering, or capital investment, are not intended to be pursued through the Transportation and Land Use Connection.

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APPENDIX B

Overview of WFRC/MAG Model Development Program

Appendix B Overview

The Wasatch Front Regional Council (WFRC) and Mountainland Association of Governments (MAG) have maintained travel demand models for the region since the mid-1970s. These models have been updated on a regular basis to ensure that they are state-of-the-practice and based on the latest travel data. In the late 1990's, WFRC and MAG combined their travel models into one model which covers the urbanized areas within both Metropolitan Planning Organizations.

In recent years, model development efforts have focused on performing a comprehensive household travel survey, recalibrating the model to incorporate the results of this survey, adding additional employment types and trip types to the model, improving the communication of model data and results, and increasing the sensitivity to urban form. In addition, efforts have focused on revamping the land use model, which is now referred to as the Real Estate Market Model, or REMM. Both the travel model and REMM cover the same geographic area, from Brigham City to Payson, along the Wasatch Front, in northern Utah. Moving forward, these two models will work together as a joint model system.

Travel Demand Model

WFRC and MAG use a four-step, urban area travel demand model as part of the regional transportation planning process to help identify transportation needs and evaluate the effect of proposed improvements. In order to continue to do this effectively, the WFRC/MAG forecasting groups have been maintaining, updating, and improving the travel demand model to state of the practice and for some model components to state of the art. This model runs on the CUBE software platform.

Upcoming tasks include, but are not limited to the following:

- Ongoing model testing and refinement
- Examine ways to better incorporate peak spreading
- Develop methodology for analyzing impact of distance based fares
- Further enhance bicycle demand forecasting capabilities, including interaction with transit
- Continue to examine methods for better forecasting peak spreading and its impact on travel behavior
- Refine recently built freight model
- Explore updating the mode choice model to be based on service characteristics rather than mode
- Automation of the visualization of model inputs and outputs

Real Estate Market Model

The purpose of developing a real estate market model (REMM) is to objectively forecast land development and socio-economic growth and allocation, with an understanding of the impact that development patterns and transportation decisions have on each other. REMM will help provide

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robust projections of the potential outcomes of different transportation investments and land use policies on private development decisions.

The REMM helps us understand land development and transportation as related systems, rather than assuming that development decisions will be static regardless of how we invest in transportation, and vice-versa. By more fully understanding how transportation decisions will function long-term, in the real world, REMM helps us better gauge the relative benefits of various competing transportation investment decisions. The net result is better stewardship of public resources.

WFRC and the MAG have been jointly working on the development of REMM for several years. This model runs on the open-source UrbanSim software platform. We currently have a functioning, calibrated model that is undergoing testing and refinement.

Upcoming tasks include, but are not limited to, the following:

- Backcast calibration and validation
- REMM model preliminary application and continued refinement
- Continue to work with expert consultants and local expert panels to refine and update model
- National Expert Peer Review
- Automation of the visualization of model inputs and outputs

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APPENDIX C

Consultant Evaluation and Selection Process

Appendix C Overview

The Consultant Selection Team will select consultants for the Pool through a Statement of Qualifications (SOQ) evaluation and selection process. SOQs will be evaluation and scored based on criteria outlined in Appendix D - *Guidelines for Preparing a Standard Statement of Qualifications*.

Required Key Personnel Qualifications

The Consultant shall be responsible to ensure that all personnel proposed under this Standard SOQ be qualified through training, experience, and appropriate certification for the tasks assigned. Completed SOQs should state the certification and education levels of the individuals referred to.

Required Standard SOQ Contents

The SOQ should contain the information identified in Appendix D - *Guidelines for Preparing a Standard Statement of Qualifications*.

Standard SOQ Evaluation Procedures

The Consultant Selection Team will evaluate the SOQs in accordance with the selection criteria described below.

Conditions of Proposal

All costs related to the preparation of the Standard SOQ and any related activities are the sole responsibility of the Consultant. The Partners assume no liability for any costs incurred by Consultants throughout the entire selection process.

Disposition of Standard SOQs

Standard SOQs and their content become the property of the Transportation and Land Use Connection Partnership, are treated as protected documents, and are disposed of according to WFRC policies. The Transportation and Land Use Connection Partners reserve the right to reject all SOQs. The SOQ of the successful Consultants shall be available to project participants for the duration of the pool cycle after being selected for the pool. Please note that SOQs will be shared with communities at the time of the award and during the consultant evaluation and selection discussion and process.

Project Categories

Consultants are required to submit qualifications for at least one of the following project categories, and are invited to submit qualifications for up to all project categories for which they feel qualified. A Consultant may submit for multiple categories, but should address each category independently. Two additional pages are allowed for each category the consultant submits for; within those two pages for that category firms should demonstrate their capability to perform work specific to that category. For example, if applying for two categories, a consultant would submit a total of 15 pages (1 cover page, 10 pages and 2 pages per category). The Consultant Selection Team will then evaluate the Consultant for each category separately and create a Consultant Pool for each of the project categories.

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The categories are as follows:

Transportation and Land Use Connection Project Categories

1. Planning
2. Ordinance Writing
3. Market Analyses/Studies

WFRC/MAG Model Development Project Categories

4. Travel Demand Model
5. Real Estate Market Model

The firm's experience and capabilities will be scored separately per each category submitted for based on the following criteria, taking into account the general information provided in the first 10 pages of the SOQ. See Appendix D.

Selection Criteria: Categories 1-3 (TLC: Planning, Ordinance Writing, Market Analyses/Studies)

1. Project Team: (50 Points) The Selection Team will evaluate how well the qualifications and experience of the members of the project team relate to the specific category. The SOQ should include:
 - Description of the qualifications and experience of key personnel on the project team.
 - WFRC recommends that firms include a list of relevant projects the team has completed, which should include the following items.
 - Name of Project Manager
 - Year
 - Type of Project
 - Project Name
 - Project Location
 - Project Description
 - Services Performed / Project Role
 - Client
 - Reference Contact and Telephone Number
2. Capability of the Consultant: (50 Points) The Selection Team will evaluate the Consultant's capability to perform the work. The SOQ should:
 - Demonstrate experience with Transportation and Land Use Connection goal-oriented projects.
 - Demonstrate experience with Smart Growth principles.
 - Describe software, skills, and tools experience (see suggested tools below).
 - Describe your firm's capability to perform the work.
 - Demonstrate the quality of work your firm upholds.
 - Describe any unique qualifications your firm has to perform this type of work and specific areas of expertise (e.g. developing design guidelines or transit station area master planning).
 - Describe your firm's internal quality and cost control procedures.
 - Describe the overall performance record of the proposed project team.

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Suggested Tools or Software that advance the goals of the TLC program (be specific about consultant expertise to related tools, resources, and software and include samples or examples of use) include but are not limited to:

- Tools within the Wasatch Choice Toolbox, such as Envision Tomorrow Plus (ET+) or the Form Based Code Template (more information found at <http://wasatchchoice.com/wasatch-choice-toolbox>)
- Implementing First/Last Mile and street connectivity strategies
- Experience with architectural, site, or streetscape rendering software
- Experience with specific public engagement and outreach techniques, such as Charrette planning, etc.

Selection Criteria: Categories 4-5 (Travel Demand Model, Real Estate Market Model)

3. Project Team: (50 Points) The Selection Team will evaluate how well the qualifications and experience of the members of the project team relate to the specific category. The SOQ should include:

- Project team flow charts including sub-consultants, if applicable.
- Description of the qualifications, experience, and availability of key personnel on the project team. (NOTE: Do not include percentages of availability as this may be misinterpreted.)
- A spreadsheet list of relevant projects you have completed during the last five years. The spreadsheet column headings should include the following items.
 - Name of Project Manager
 - Year
 - Type of Project
 - Project Name
 - Project Location
 - Project Description
 - Services Performed / Project Role
 - Client
 - Reference Contact and Telephone Number

1. Capability of the Consultant: (50 Points) The Selection Team will evaluate the Consultant's capability to perform the work. The SOQ should:

- Describe your firm's capability to perform the work.
- Describe any unique qualifications your firm has to perform this type of work. The selection team will be looking for details on specific areas of expertise (e.g.- mode choice or freight)
- Describe your firm's internal quality and cost control procedures.
- Describe your firm's experience with this specific type of work identified.
- Identify the location of the main office of the proposing firm and the logistics relating to how the project team will provide the services requested.
- Describe the overall performance record of the proposed project team.

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APPENDIX D

Guidelines for Preparing a Statement of Qualifications

Introduction

These guidelines were developed to standardize the preparation of SOQs by Consultants for Transportation and Land Use Connection and WFRC/MAG Model Development Support projects. Submitting an SOQ is the beginning of the selection process and will be used as the basis for selecting Consultants for the pool. Preparing a Pool SOQ instead of a detailed proposal for each available project reduces the time and cost requirements for Consultants and simplifies the review process for the Consultant Selection Team.

Standard SOQ Format Requirements

It is very important that submittals be clear, concise, and in the recommended format so they may be evaluated in an objective manner by the Consultant Pool Selection Team.

The Standard SOQ is expected to consist of the following (in order):

- **1 page:** Cover Page.
It must consist of information found in the table *on the following page* with no additional information. The Cover Page may be presented in any format the Consultant chooses, i.e. text, chart, etc.
- **10 pages:** Statement of Overall Firm Qualifications.
Discuss Related Experience, Project Team, Consultant Capability, and Project Organization.
- **2 pages each:** Project Category Write-ups.
Independent write-ups pertaining to at least one and up to all five of the project categories. This will total from 2-10 pages, a maximum of 2 pages for each category. (For example, if applying for two categories, a consultant will submit a total of 14 pages.) See Appendix C.

Depending on the number of Project Categories a firm applies for, the SOQ will range from 13-21 pages excluding the front and back cover, but including the cover page. An SOQ for one category will be 13 pages; an SOQ for 3 categories will be 17 pages, etc.

The following are formatting standards for the SOQ:

1. Color is allowed.
2. 8-1/2" X 11" Page Sizes, no page orientation specified.
3. Front and Back Covers are allowed – Information on the front and back covers is not restricted. Front and Back covers will not count towards the page maximum.

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| COVER PAGE REQUIRED INFORMATION (can be in any format but must include the information below) | |
|--|--|
| Date | |
| SOQ Name and Description | |
| Consultant Firm | |
| Consultant Firm's Federal ID Number | |
| PRIMARY CONTACT INFORMATION | |
| Primary Contact Person | |
| Address | |
| City, State, Zip Code | |
| E-Mail Address | |
| Office Phone | |
| Cellular Phone | |
| SECONDARY CONTACT INFORMATION | |
| Primary Contact Person | |
| Address | |
| City, State, Zip Code | |
| E-Mail Address | |
| Office Phone | |
| Cellular Phone | |

Summary

The SOQ should be clear, concise, and it should provide the Consultant Selection Team with an understanding of the Consultant's ability to undertake and complete the proposed project in a thorough and timely manner. Please note that SOQs will be shared with communities at the time of the TLC award and during consultant procurement.

Consultant SOQ Scoring

The Consultant Selection Team members will receive copies of each SOQ submitted. They will review and score the SOQs individually based on the "Selection Criteria" found in Appendix C and submit their scores and comments to the Program Administrators. Final SOQ score results are determined from the average of voting Consultant Selection Team members' scores. The selection team may ask additional questions relative to the submitted qualifications and will call applicants as needed.