

Request for Statements of Qualification (SOQ):

Wasatch Front Regional Council (WFRC) & Mountainland Association of Governments (MAG) Planning and Model Development Consultant Pool

Consultant Pool 2023-2025 Submission and Review Schedule

DATE	ACTION
October 13, 2022	RFQ Released
November 3, 2022	Deadline for questions
November 17, 2022	SOQs are due to WFRC by 3:00 PM.
December 2022	SOQ Review Team Meeting
January 2023	Notification of Pool Status

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

WFRC Contact Persons: Megan Townsend
Community and Economic Development Director, WFRC
Wasatch Front Regional Council
Telephone: (801) 404-8925
E-Mail Address: mtownsend@wfr.org

Open Consultant Pool Advertisement

The RFQ will be released on the WFRC and MAG websites and SciQuest.



MAG
Expert Resources. Enriching Lives.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

Questions and Answers

All questions must be emailed to Megan Townsend, mtownsend@wfr.org, by November 3, 2022 at 3:00pm. Questions and their answers will be compiled and posted on our website and on 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). Send or deliver an electronic PDF file of the SOQ via email or file transfer to Megan Townsend, Wasatch Front Regional Council at the address below **no later than 3:00 PM on November 17, 2022**. See Submission Instructions in Attachment D. Label by firm and year, i.e. "FIRMNAME_2023_SOQ".

E-Mail Address

mtownsend@wfr.org

Please look for an email confirming receipt of your SOQ. If you do not receive confirmation within 48 hours of submitting your SOQ, please contact Megan Townsend at 801-404-8925. You are responsible for ensuring that your SOQ was received on time.

Late Submission is defined as any SOQ received after the **November 17, 2022 3:00 PM deadline**. Late submissions will not be accepted. The Consultant Review Team reserves the right to disqualify an application when the content requirements are not met.

Evaluation Based Selection

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

SOQ Content and Formatting

All SOQs submitted should be prepared in accordance with Section 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 email list.

Evaluation Criteria

SOQs will be compared and evaluated based on the criteria identified in Section C - *Consultant Evaluation and Selection Process*.

Consultant Pool Standing

All consultant firms who wish to be included in the 2023-2025 pool must submit a proposal in accordance with this RFQ. At the point of announcement of the 2023-2025 pool, the previous 2020-2022 pool will expire. Selected consultants will form a pool of firms that will be available for the WFRC & MAG Planning and Model Development Consultant Pool assistance for three years. Project sponsors and partners will utilize consultants on an as-needed basis to complete specific projects or for support needs. Eligible consultants will remain in the Pool **until December 2025**. All consultants will have to renew their standing in **November of 2025** in order to be included in future pools.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

**SECTION A
Overview of Planning Technical Assistance Programs**

Section A Overview

WFRC and MAG are jointly seeking Statements of Qualifications from eligible consultants to form a prequalified pool of consultants to provide planning and technical assistance to local government projects.

The administration of procurement through a Consultant Pool reduces the time it takes to procure consultants for each individual project. A variety of consultant expertise is needed to address a wide range of land use and transportation planning related projects.

Procurement of projects for the following three programs will be formally tied to the consultant pool:

1. Transportation and Land Use Connection Program (WFRC)
2. Station Area Planning Technical Assistance (WFRC and MAG)
3. Technical Planning Assistance Program (MAG)

WFRC and MAG may utilize the Consultant Pool for other planning support needs beyond these three programs.

PROGRAMS

Transportation and Land Use Connection Program (WFRC)

TLC Program Description

The Transportation and Land Use Connection (TLC) program is a partnership between the Wasatch Front Regional Council (WFRC), Salt Lake County, Utah Department of Transportation (UDOT), and Utah Transit Authority (UTA).

The TLC program provides technical assistance to local communities to help them achieve their goals and plan for growth. The program helps communities implement changes to the built environment that reduce traffic on roads and enable more people to easily walk, bike, and use transit. This approach is consistent with the Wasatch Choice Vision and helps residents living throughout the region enjoy a high quality of life through enhanced mobility, better air quality, and improved economic opportunities. More information about the program and projects can be found here: <http://www.wfrc.org/tlc>

TLC Program Mission

The Transportation and Land Use Connection supports local governments in their planning efforts, implementing the Wasatch Choice Vision.

TLC Program Goals

- Maximize the value of investment in public infrastructure.
- Enhance access to opportunities.
- Increase travel options to optimize mobility.
- Create communities with opportunities to live, work, and play.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

TLC 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).

Past projects are displayed on the project map, linked below.

<https://wfrc.maps.arcgis.com/apps/webappviewer/index.html?id=a07232349fe6443c9de33aab218e218f>

Project phases such as land acquisition, or capital investment, are not eligible to receive funding through the Transportation and Land Use Connection.

Station Area Planning (SAP) Technical Assistance (WFRC and MAG)

SAP Program Description

The Wasatch Front Regional Council and the Mountainlands Association of Governments provide technical assistance for station area planning and SAP implementation in partnership with the Governor’s Office of Economic Opportunity and the Utah Transit Authority.

[HB462](#) asks cities with fixed guideway transit stations to complete a station area plan in order to advance shared goals by maximizing development potential in appropriate areas through a collaborative city-led planning approach, allowing cities to determine how best to meet shared objectives without mandating a specific approach or zoning.

In order to help cities accomplish this work, GOEO awarded \$5 million to the MPOs (Mountainland Association of Governments (MAG) and Wasatch Front Regional Council (WFRC)) to provide technical assistance to cities. This may take the form of consultant time, or MPO and Utah Transit Authority (UTA) staff time, depending on project needs.

SAP Goals

- Increase the availability and affordability of housing, including moderate income housing.
- Promote sustainable environmental conditions.
- Enhance access to opportunities.
- Increase transportation choices and connections.

SAP Project Eligibility

Eligibility includes all planning and analysis that enables cities to meet the requirements of the Station Area Planning provisions of HB462, and implement those station area plans. Capital projects are not eligible to receive funding.

The applications will be reviewed by representatives from the MPOs (MAG and WFRC), UTA, and GOEO on a two month cycle.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

Technical Planning Assistance Program (MAG)

TAG Program Description

The TAG Program provides technical consultant services to local governments throughout Utah, Wasatch, and Summit Counties to proactively address growth, consistent with the Wasatch Regional Vision and TransPlan50 Regional Transportation Plan (for projects located in Utah County).

TAG Goals

Key goals of the TAG Program include:

- Help local governments create opportunities for growth in existing centers
- Encourage coordination between land use plans and existing or planned regional transportation systems
- Reduce travel demand and enhance the performance of the overall multi-modal transportation system by enabling shorter commutes, providing more travel choices, and cultivating alternative land development strategies
- Promote multi-jurisdictional collaboration and outcomes of regional significance
- Support the implementation of economic development plans and programs
- Support local outreach and engagement efforts that promote broad stakeholder involvement.

TAG Project Eligibility

Assistance is available to municipalities, counties, townships, and multijurisdictional groups of local governments within the MAG area of responsibility (Utah, Wasatch, and Summit Counties).

Program funds may be used for planning activities that integrate land use and transportation, from visioning and analysis to planning and design work prior to entitlement and construction.

PROCUREMENT

Planning Technical Assistance Project Procurement

The Consultant Pool enables a streamlined procurement process for planning technical assistance projects. For projects under \$100,000 the local government may opt to select directly from the Pool or go through competitive consultant procurement. Awarded planning technical assistance projects with total budgets over \$100,000 undergo a streamlined competitive consultant procurement process utilizing the Consultant Pool. Program administrators will distribute all Statements of Qualifications to the local government who will then select a minimum of three consultants (up to the entire pool) within the pool 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, or with multiple funding partners, an alternative consultant procurement process may be utilized. Please note that SOQs will be shared with communities at the time of the TLC award and during consultant procurement.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

Non-Profit Organization and Academic Participation

Non-profit organizations, community-based organizations, and academic institutions may participate in projects and be compensated for work efforts at the discretion of awarded communities and program partners subject to applicable procurement requirements. Participation of such entities will be subject to a standard demonstration of qualifications, mission alignment, and benefit to the project and awarded community. The Consultant Pool will be notified upon invitation to submit a proposal if a project will have any component of non-profit or academic participation.

SECTION B

Overview of WFRC/MAG Model Development Program

Section 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 and other emerging data resources, 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 and developing a bike demand model.

Travel Demand Model

WFRC and MAG use a traditional 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 Citilabs Cube Voyager software platform.

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

- Ongoing model calibration, validation, testing and application refinement
- Refining methods for analyzing impact of vehicle travel tolling/pricing and transit fare policies
- Further enhancing the models' treatment of active transportation and interaction with transit
- Examine methods for better forecasting peak spreading and its impact on travel behavior
- Refining the freight model
- Automating the visualization of model inputs and outputs

Real Estate Market Model

The purpose of the WFRC/MAG real estate market model (REMM) is to support an objective forecasting of land development and the future distribution of households and employment.

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 decision scenarios 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 an important input into the prudent stewardship of public resources.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

REMM. utilizes the open-source UrbanSim software platform.

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

- Automation of input data preparation
- Work with expert consultants and local expert panels to refine and update model
- Automation of the review/analysis and visualization of model inputs and outputs

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

**SECTION C
Consultant Evaluation and Selection Process**

Section C Overview

The Consultant Review Team will select consultants for the Pool through a Statement of Qualifications (SOQ) evaluation and selection process. SOQs will be evaluated and scored based on criteria outlined in Section 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, education levels, and experience of the individuals referred to.

Required Standard SOQ Contents

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

Standard SOQ Evaluation Procedures

The Consultant Review Team will evaluate the SOQs in accordance with the selection criteria described on pages 11-12.

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 procuring MPO, are treated as protected documents, and are disposed of according to WFRC policies. The MPOs 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 three categories, a consultant would submit a total of 15 pages (1 cover page, 8 pages and 2 pages per category). The Consultant Review Team will then evaluate the Consultant for each category separately.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

The categories are as follows:

Planning Technical Assistance

Project Categories

1. **General Plans:** Please describe your firm's qualifications in this category and ability to do this work. May include all elements of a general plan, or a subset, but must include the capacity to lead a complete general plan effort. Should include capability of consultant to conduct both virtual public engagement and in-person public engagement.
2. **Water, Environmental, Sustainability Studies & Plans:** Please describe your firm's qualifications in this category and ability to do this work. May include brownfield mitigation, watershed and wetland expertise, hydrology analysis, working with the EPA or conservation groups, etc.
3. **Active Transportation Plans:** Please describe your firm's qualifications in this category and ability to do this work. May include regional, city, or center active transportation plans, concept development and pre-engineering, and suitability analysis, other bicycle and pedestrian planning, etc.
4. **Small Area Plans:** Please describe your firm's qualifications in this category and ability to do this work. Please describe skills within the full scope of a small area plan, including but not limited to public outreach, analyses, urban design, etc.
5. **Parks, Recreation, Open Space Plans:** Please describe your firm's qualifications in this category and ability to do this work. May include landscape architecture, public space design, branding and wayfinding, park master planning, etc.
6. **Transportation Corridor & Master Plans, Parking Studies:** Please describe your firm's qualifications in this category and ability to do this work. May include transportation master plans, transit studies, corridor plans, concept development, transportation and traffic modeling, street connectivity, alternatives analysis, complete streets, etc.
7. **Market Analysis, Economic Development Plans:** Please describe your firm's qualifications in this category and ability to do this work. May include the collection of existing conditions in relation to current economic trends, projecting revenues and expenditures resulting from specific planning activities, fiscal analyses of land use, developing financial strategies, private sector marketing, economic development plans, etc.
8. **Zoning and Design Ordinance Writing:** Please describe your firm's qualifications in this category and ability to do this work. May include form-based or Euclidean zoning, design standards, zoning audits, etc.

Specialized Skill Sets (optional).

These specialized skill sets are sought after across a variety of different projects. If you have experience in any or all of the following areas, please describe your qualifications and experience. Limit 1 page per skillset.

- **Inclusive Engagement of Diverse Groups**
- **Statistically Valid Surveys**
- **Digital Infrastructure Planning**
- **Station Area Planning**

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

Model Development Project Categories

1. **Travel Demand Model:** Please describe your firm's qualifications in this category and ability to do this work. May include model development, estimation/calibration, technical review, data development, visualization tools, forecast preparation.
2. **Real Estate Market Model:** Please describe your firm's qualifications in this category and ability to do this work. May include model development, estimation/calibration, technical review, data development, visualization tools, forecast preparation.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

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 8 pages of the SOQ. See Section D.

Selection Criteria per each Category (1-10)

1. Skills (30 Points): The Review 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, including any certifications or areas of specialization
 - Demonstration of overall qualification to perform category-specific work
 - Describe specific expertise that differentiates your firm's capabilities to perform this type of work
 - Describe software, skills, and tools experience

2. Relevant Projects (40 Points): The Review Team will evaluate projects the team has completed relevant to the specific category, which should include the following information.
 - Name of Project Manager
 - Year
 - Type of Project
 - Project Name
 - Project Location
 - Project Description
 - Services Performed / Team's Role
 - Client
 - Budget

3. Project Management Experience (30 Points): The Review Team will look for and evaluate the following:
 - Demonstration of ability to manage a project through to completion
 - Demonstration the quality of work the firm upholds
 - Description of the firm's internal quality and cost control procedures
 - Description of the team's experience working together to successfully provide similar services
 - Adaptability, or creative solutions to reach client satisfaction
 - Procedures in place to prevent project delay

Consultants must meet a minimum composite score of 60 points and no fewer than 30 points for each criteria (Project Team and Capability of the Consultant) in order to be admitted into the 2023-2025 Consultant Pool for that category. The Review Team may ask additional questions relative to the submitted qualifications and will call applicants as needed. Specialized Skill Sets will be noted, but not scored.

**Request for Qualifications:
WFRC & MAG Planning and Model Development Consultant Pool 2023-2025**

**SECTION D
Guidelines for Preparing a Statement of Qualifications**

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 Review Team.

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

- **1 page:** Cover Page.

The cover page *must consist of information found in the table below*, and may contain a title, images, date, firm names, and logos, with no additional content. The Cover Page may be presented in any format the Consultant chooses, i.e. text, chart, etc.

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	
List Categories Selected (category numbers 1-10 may be listed)	
PRIMARY AND SECONDARY CONTACT INFORMATION	
Primary Contact Person	Secondary Contact Person
Address	Address
City, State, Zip Code	City, State, Zip Code
E-Mail Address	E-Mail Address
Office Phone	Office Phone
Cellular Phone	Cellular Phone

- **8 pages:** Statement of Overall Firm Qualifications and Relevant Experience. Discuss Overall Experience, Project Team, Consultant Capability, and Project Management.
- **2 pages each:** Category Pages. Independent write-ups pertaining to at least one and up to all ten of the project categories. This will total from 1-20 pages, a maximum of 2 pages for each category. See Section C. These pages may refer back to previous pages, such as the "Statement of Overall Firm Qualifications." Please include at least one project example, and briefly describe your firm's role within that project.
- **1 page each (optional):** Specialized Skill Sets. Maximum of 4 pages.
- **Certificate of Liability Insurance must be attached.**

2. Color is allowed.
3. 8-1/2" X 11" Page Sizes, no page orientation specified.
4. Back covers and divider pagers (4 pages maximum) are allowed in addition to page maximum. Dividers may contain only images and section titles.