



REQUEST FOR PROPOSALS

*THE TRANSPORTATION AGENCY FOR MONTEREY COUNTY (TAMC)
INVITES CONSULTANTS TO SUBMIT THEIR PROPOSALS FOR THE:*

STATE LEGISLATIVE ANALYST/ ADVOCATE

You are invited to submit your proposal for the services to complete the above project. Proposals are due in the office of the Executive Director of the Transportation Agency for Monterey County, 55 B Plaza Circle, Salinas, CA 93901-2901 by **12:00 noon on PST on Thursday, April 27, 2017.**

Copies of the RFP and the detailed information regarding the submission of the proposal are available at the TAMC offices and may be obtained upon request. This RFP is available at the TAMC website (www.tamcmonterey.org) in Adobe Acrobat (PDF) format. You may call Christina Watson, Principal Transportation Planner, at (831) 775-0903 to obtain a copy and for further information.



TRANSPORTATION AGENCY FOR MONTEREY COUNTY

DATE: March 22, 2017

TO: Interested Consultants

FROM: Debra L. Hale, Executive Director

SUBJECT: State Legislative Analyst/ Advocate Services

INVITATION

You are invited to submit a Proposal for the referenced services together with a Fee Schedule that includes an estimate of costs per task to complete the project. Please include your estimate of other direct costs charged to this project. Please submit three (3) paper copies and one (1) digital copy of your Proposal.

Your Proposal is due in the office of the Transportation Agency for Monterey County (TAMC), **55 B Plaza Circle, Salinas, CA, 93901**, by **12:00 noon on Thursday, April 27, 2017**. Proposals received after the date and time specified above will not be considered.

Proposals shall be considered firm offers to enter into a contract, as described in this RFP for a period of ninety (90) days from the time of submittal.

Proposals and inquiries relating to this Request for Proposals shall be submitted to:

Christina Watson, Principal Transportation Planner
Transportation Agency for Monterey County
55 B Plaza Circle, Salinas, CA 93901-2901
831-775-0903 ~ christina@tamcmonterey.org

Email inquiries relating to this Request for Proposals should include "State Legislative Analyst/ Advocate Services" in the subject header.

BACKGROUND

The Transportation Agency for Monterey County (TAMC) is the designated Regional Transportation Planning Agency (RTPA) for Monterey County. TAMC represents thirteen jurisdictions, including the cities of Carmel-By-The-Sea, Del Rey Oaks, Gonzales, Greenfield, King City, Marina, Monterey, Pacific Grove, Salinas, Sand City, Seaside, Soledad and the County of Monterey. In addition, TAMC has five ex-officio member agencies, including the Association of Monterey Bay Area Governments (AMBAG), the Monterey Peninsula Airport District (MPAD), Monterey-Salinas Transit (MST), the Monterey Bay Unified Air Pollution Control District (MBUAPCD), and Caltrans District 5.

TAMC is a state-designated public agency with regional transportation planning responsibilities that cross city-county boundaries. TAMC is committed to planning, funding and delivering transportation projects for the region. The Agency is also committed to providing information to the public about its projects, plans and activities, ensuring public participation and fostering public understanding of its functions.

TAMC's Board of Directors includes twenty-three members who consist of local officials from each of its twelve incorporated cities and five county supervisorial districts, and ex-officio members from six public agencies.

The mission of TAMC is to proactively fund and plan a transportation system that enhances mobility, safety, access, environmental quality and economic activities by investing in regional transportation projects for Monterey County residents, businesses and visitors.

PROJECT DESCRIPTION

TAMC invites the submission of proposals by qualified Professional Firms for State Legislative Analyst/ Advocate Services that covers the three consecutive fiscal years for FYs 2017/18, 2018/19, and 2019/20.

TAMC is looking for proposals from qualified consultants to provide financial advisory services in accordance with the proposed Scope of Work (Attachment A). This work will consist of providing key assistance in securing state transportation funding and pursuing other issues, pursuant to the adopted legislative program. It is anticipated that the term of any Agreement with TAMC will be for a two-year period, with an option for TAMC to extend the Agreement for an additional year.

A final Scope of Work will be made a part of the professional services Agreement between TAMC and the consultant. A copy of the template lump sum Agreement anticipated to be used by TAMC is included in Attachment B. A single document will be prepared between the Consultant and TAMC consistent with the provisions of these attachments. Submission of a response to this RFP is an indication by the Responder that the terms contained in the sample Agreement are acceptable, unless there is a specific identification of any term requested to be changed, along with proposed language and a justification therefore.

It is important that the consultant have the capability to work closely with TAMC staff. The consultant or consultant team must be prepared to undertake whatever liaison and meetings are required to satisfy this requirement.

SELECTION PROCESS

TAMC will establish a committee to review the proposals. This review may be followed by an interview between a review committee and the firm(s) that responds best to the RFP. Based on the recommendations of the review committee, Transportation Agency staff will issue a "Tentative Award" notice to all responders, indicating staff's intent to negotiate with the specific firm considered to be the most qualified consultant or consultant team. Staff will then attempt to negotiate a final Scope of Work and a Fee Schedule for the project with that firm. The final Scope of Work will include a full description of each task, a description of deliverable products, and a schedule of the due dates for the deliverable products and other important milestones. Upon successful completion of negotiations the consultants or consultant teams will be recommended to the TAMC Board for final selection and contract approval.

Should the most qualified consultant or consultant team and TAMC fail to successfully negotiate a final scope of work and a mutually agreed upon Fee Schedule for these consulting services, then TAMC reserves the right to enter negotiations with the next most qualified candidate for performance of the work.

Further, the Agency may, or may not, also negotiate contract terms with selected proposers prior to award, and expressly reserves the right to negotiate with several proposers simultaneously and, thereafter, to award a contract to the proposer offering the most favorable terms to the Agency. Proposals submitted, therefore, should contain the proposers' most favorable terms and conditions, because the selection and award may be made without further discussion with any proposer. The Agency reserves the right to accept or reject any and all submitted proposals, to waive minor irregularities, and to request additional information or revisions to offers, and to negotiate with any or all proposers at any stage of the evaluation.

Factors to be considered in selecting the consultant(s) are indicated below:

- 1) *Responsiveness*: Demonstrates a history of providing timely responses to requests for information in a manner appropriate to the urgency of the request. (20 points)
- 2) *Proactiveness*: Suggests bills and transportation-related developments or proposals to watch, hearings to attend, and/or grants to pursue. Shows ability to draft and promote Agency-sponsored bills and suggest a bill author. (20 points)
- 3) *Positive Relationships*: Gets positive feedback/references from elected representatives, administration representatives, and California Transportation Commissioners. For example, receives positive comments from legislators, and shows success in setting up meetings in a timely manner and, as applicable, engaging with sponsors and author(s) of potential Agency bills. (20 points)

- 4) *Quality of Work*: Produces written work of a high quality and with sufficient detail that would not require Legislative and/or Agency staff to rewrite or redo. (20 points)
- 5) *Project Understanding*: Exhibits an understanding of the Agency's priority projects and ability to promote those priority projects. Exhibits a depth of knowledge of transportation funding and policy issues. (20 points)

The evaluation committee will review and rank the Proposals and may conduct interviews, if necessary. The evaluation committee will forward its recommended rankings to the TAMC Executive Director, who will make a recommendation to the Executive Committee, who will make a recommendation to the TAMC Board of Directors. The TAMC Board of Directors will finalize the rankings and select a consultant. The TAMC Board will select the consultant based upon demonstrated competence and professional qualifications.

QUESTION & ANSWERS, REQUESTS FOR CLARIFICATION OR EXCEPTIONS, ADDENDA

This Request for Proposals and any addenda will be posted on TAMC's website (www.tamcmonterey.org). Questions and answers regarding the request for proposals will also be posted on the website. All potential bidders are responsible for checking the website for any addenda to the bid documents. To receive email notifications of addendums to this Request for Proposals, prospective proposers must submit an email request to the Project Manager.

Any requests for clarification or exceptions to requirements in this Request for Proposals must be received by the Agency no later than **12 noon, Pacific Standard Time, on Thursday, April 6, 2017**, to guarantee response or consideration. Responses to questions concerning this Request for Proposals posed before this deadline will be posted on the Agency's website (www.tamcmonterey.org).

SUBMITTAL REQUIREMENTS/ PROPOSAL FORMAT

All interested firms are required to submit ***three (3) double-sided hard copies AND one (1) digital copy*** of their Proposal to perform the requested consulting services. The Proposal must include the names and qualifications of all personnel to be employed on the project. The Proposal should provide a short description of the firm's experience with projects that relate to this Scope of Work. A list of relevant past clients should be included.

A. Project Team

The Proposal shall clearly identify a Project Manager and include the names and qualifications of all personnel of the proposed team to be assigned to the contract and a chart representing the proposed organizational structure of the team. The Proposal shall demonstrate that the key personnel have the time available to work on the project. The Proposal shall include the estimated number of hours individual personnel will dedicate to the project.

B. Demonstrated Knowledge

The Proposal shall include the assigned project team's demonstrated knowledge of, expertise and experience with providing similar services and completing similar types of contracts.

C. Work Plan

The Proposal shall include the consultant's proposed approach to the development and implementation of the scope of work, broken out by tasks which demonstrate the consultant's knowledge and understanding of the project and the constraints and challenges associated with performing the tasks outlined in the scope of work.

D. Cost Proposal

The Proposal must include a cost proposal. The annual not-to-exceed amount is Thirty Thousand Dollars (\$30,000). The anticipated contract will be for a two-year period with an optional one-year extension. The contract will be paid in lump sum progress payments at the end of the month based on the receipt of a progress report citing work done that month. The Proposal must contain an overall cost for the project as well as cost by task. An estimate of hours by task is also required.

E. Proposed Schedule of Work and Deadlines

The Proposal must include availability of the Project Team to conduct work within the anticipated timeframes.

F. References

The Proposal shall include at least three (3) recent references from past clients for similar types of work. Include contact person, e-mail address and phone number.

All Proposals shall be submitted to the office of Christina Watson, Principal Transportation Planner, Transportation Agency for Monterey County, 55 B Plaza Circle, Salinas, CA 93901-2901 ***no later than 12:00 noon on Thursday, April 27, 2017.***

Late submittals will not be accepted.

PROPOSED SCHEDULE

Date/ Timeframe	Task
March 22, 2017	Release RFP
April 6, 2017	Questions Due
April 13, 2017	Revised RFP released (if necessary)
April 27, 2017	Proposals Due
April 27-May 8, 2017	Sub-committee Review and Ranking of Submittals
May 8-17, 2017	Interviews, if necessary
May 18, 2017	Recommendation to the Executive Director
May 25, 2017	Executive Director Recommendation to the Executive Committee
June 7, 2017	Executive Committee Recommendation to TAMC Board
June 28, 2017	TAMC Board Approval of Consultants

MISCELLANEOUS**A. Modification or Withdrawal of Submittals**

Any Proposals received prior to the date and time specified above for receipt may be withdrawn or modified by written request of the proposer. To be considered, however, the modified Proposal must be received by the time and date specified above.

B. Property Rights

Any Proposals received within the prescribed deadline become the property of TAMC and all rights to the contents therein become those of TAMC.

C. Confidentiality

Before award of the contract, all Proposals will be designated confidential to the extent permitted by the California Public Records Act. After award of the contract (or if not awarded, after rejection of all Proposal), all responses will be regarded as public records and will be subjected to review by the public. Any language purporting to render all or portions of the Proposal confidential will be regarded as non-effective and will be disregarded.

D. Amendments to Request for Proposals

TAMC reserves the right to amend the Request for Proposals by addendum before the final Proposal submittal date.

E. Non-Commitment of TAMC

This Request for Proposals does not commit TAMC to award a contract, to pay any costs incurred in the preparation of a Proposal for this request, or to procure or contract for services.

All products used or developed in the execution of any contract resulting from this Request for Proposals will remain in the public domain at the completion of the contract.

F. Conflict of Interest

The prospective consultant shall disclose any potential financial, business or other relationship with TAMC that may have an impact upon the outcome of this contract or TAMC construction project. The prospective consultant shall also list current clients who may have a financial interest in the outcome of this contract or TAMC projects that will follow. In particular, the prospective consultant shall disclose any financial interest or relationship with any construction company that might submit a bid on TAMC projects.

G. Nondiscrimination

The prospective consultant must certify compliance with nondiscrimination requirements of TAMC pertaining to the development, implementation and maintenance of a nondiscrimination program. The prospective consultant's signature affixed to and dated on the cover letters shall constitute a certification under penalty of perjury under the laws of the State of California that the proposer has, unless exempted, complied with the nondiscrimination program requirements of Government Code Section 12990 and Title 2, California Code of Regulations, Section 8103.

H. Final Selection and Protests

The RFP process is considered concluded when a letter is sent to all participating consultants indicating which consultant will be recommended for Board approval. The firm recommended is not a final selection and no contract is certain until approved by TAMC Board of Directors.

Protestants shall submit a detailed written statement of protest to:

Transportation Agency for Monterey County
55-B Plaza Circle
Salinas, CA 93901

no later than five (5) business days after receipt of the Tentative Award notice described above.

QUESTIONS

For questions regarding this RFP, please contact Christina Watson, Principal Transportation Planner, at 831-775-4406 or by e-mail at christina@tamcmonterey.org, no later than April 6.

Attachments:

- A. Scope of Work
- B. Sample TAMC Standard Lump Sum Agreement for Professional Services
- C. Certification of Consultant
- D. Sample of Cost Proposal