



REQUEST FOR PROPOSALS

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

PROJECT TITLE

You are invited to submit your proposal for the services to complete the above project. Proposals are due via email to the project manager, [Project Manager name and email] by **12:00 noon Pacific Standard Time on [date].**

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 email [project manager email] to obtain a copy and for further information.



TRANSPORTATION AGENCY FOR MONTEREY COUNTY

DATE: **date**

TO: **Interested Consultants**

FROM: **Debra L. Hale, Executive Director**

SUBJECT: **Request for Proposals**

INVITATION

You are invited to submit a Proposal **[if not A&E contractor]** together with your proposed fee **schedule** for:

[project title]

If this is an A&E Contract, include this paragraph:

This request is seeking services that qualify as “Architecture and Engineering” (A&E) services under state law. TAMC will negotiate the project budget after selection of the top ranked consultant. The cost proposal is not requested until the consultants have been final ranked based upon their submitted technical proposal. Upon notification if your firm is selected as the top ranked firm, TAMC will require completion of the appropriate Caltrans cost proposal form to initiate budget negotiations.

Please submit one (1) digital copy of your Proposal via email to Transportation Agency for Monterey County, **[Project Manager, project manager’s email]** by **12:00 noon PST on [date]**. Paper copies will not be accepted. 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:

[name]
TAMC Project Manager
[email]

Email inquiries, including the submittal, should include **[Project Title]** in the subject header.

BACKGROUND

The Transportation Agency for Monterey County (“TAMC” or the “Agency”) is a state-designated public agency with regional transportation planning responsibilities, including rail planning, 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 several 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

This request for proposals will be used by TAMC to select a consultant or consultant team to [insert a few sentences on the project description.]

Attachment A is a draft Scope of Work. 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 agreement anticipated to be used by TAMC is Attachment B. A single document will be prepared between the Consultant and TAMC consistent with the provisions of these attachments.

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

PROJECT BUDGET and CONTRACT TERM

The allocated budget for this work is [XXXXXX], paid for out of [FUNDING SOURCE/S]. The term of the contract will be [XXXX] years. [ALSO NOTE HERE IF IT IS A TASK ORDER CONTRACT]. There is [no] federal funding on this project. This project is anticipated to take approximately [x] years to complete, starting in [start month] and being completed by [end date].

SELECTION PROCESS

TAMC will establish a committee to review the submittals. This review may be followed by an oral interview between a review committee and the firm(s) that respond(s) best to the solicitation. Based on the recommendations of the review committee, TAMC staff will issue a “Notice of Intent to Award” notice to all responders, indicating staff’s intent to negotiate with the specific consultant or consultant team considered to be the most qualified.

[ADD THE FOLLOWING PARAGRAPH FOR A&E CONTRACTS ONLY]:

Staff will then attempt to negotiate a final Scope of Work and a Budget 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. The Budget shall include an estimated cost per task and use the appropriate Caltrans cost proposal format. 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 budget 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 will submit the proposal considered to be the most responsive and competitive to the Board of Directors for consideration and selection.

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.

The evaluations will be based upon the following criteria:**[PROJECT MANAGER MAY MODIFY AS APPROPRIATE]**

1	<u>Firm Profile & Project Team:</u> Do the qualifications of key personnel to be assigned to the project coincide with tasks listed in the Scope of Work? Do assigned personnel and sub-consultants have requisite education, experience, and professional qualifications? Does the firm's organizational structure show sufficient depth for its present workload, and do assigned personnel have sufficient availability for project? Does the firm accept the contract terms as proposed?	20 points
2	<u>Relevant Project Experience:</u> Has the firm demonstrated the ability to successfully provide services for projects of a similar complexity and nature as described herein? Is the firm familiar with transportation in the Monterey Bay Area? [add project-specific descriptors]	20 points
3	<u>Specific Approach:</u> How will the firm, specifically the key personnel assigned to the project, apply its techniques and resources to ensure the project is properly completed? How will key personnel approach problems when they arise? Has the firm described its ability to achieve specified project delivery goals? Has the firm considered alternative concepts to achieve the desired goals? [modify with project-specific goals]	50 points (45 points if Cost is a factor)
4	<u>References:</u> Are the firm's references from past clients and associates favorable? Does the firm show financial and operational stability?	10 points
5	<u>Cost:</u> Is the proposed budget equal to or less than the independent cost estimate? How does the proposed budget compare across submittals? [for non-A&E contracts only]	5 points

Total of 100 possible points**QUESTION & ANSWERS, REQUESTS FOR CLARIFICATION OR EXCEPTIONS, ADDENDA**

This Request for Proposals and any addenda will be posted on the Agency'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, and the proposal must cite any addenda to be responsive. 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, PST, on Thursday, [date – suggested 2 weeks prior to due date]**, 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 AND FORMAT

All interested firms are required to submit one (1) digital copy of their Proposal to perform the requested consulting services.

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

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. [CUSTOMIZE TO THE WORK]

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. References

The Proposal shall include at least three (3) recent references from past clients for similar types of work.

[FOR NON-A&E CONTRACTS ONLY]:

E. Cost Proposal

The statement of qualifications shall include a listing of the hourly rates for the assigned personnel for the three-year term of the contract.

PROPOSED SCHEDULE

Date/ Timeframe	Task
Two weeks prior to TAMC Board approving release of RFP	Issue Notice of Intent to publish Request for Proposals
TAMC Board approves RFP	Distribute RFP
Two weeks after TAMC Board approves RFP	Pre-proposal conference at TAMC, 10:00 am PST (optional)
One month after Pre Proposal Conference	Deadline for questions and/or requests for clarification or exceptions by 12:00 pm noon PST
Six weeks after release of RFP	Proposals due by 12:00 pm noon PST
During the week after proposals are submitted	Review and rank proposals
Two to three weeks after proposals are submitted	Hold interviews (if necessary)
One month prior to TAMC Board meeting for approval – allows time to negotiate contract	Determine top ranked consultant, send Tentative Award letter, negotiate contract
TAMC Board approves Contract	Bring contract to TAMC Board for approval

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 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 "Tentative Award" 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 letter described above.

QUESTIONS

If you need assistance or have any questions, please email the Project Manager, [name] at [email].

Attachments:

- A. Scope of Work
- B. Sample TAMC Standard Agreement for Professional Services
- C. Sample Invoice Cover Page Format

[FOR A&E CONTRACTS ONLY]:

- D. Sample Cost Proposal Format
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