



## **REQUEST FOR QUALIFICATIONS**

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

### **[PROJECT TITLE]**

You are invited to submit your Statement of Qualifications for the services to complete the above project. Qualifications 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 RFQ and the detailed information regarding the submission of the Statement of Qualifications are available at the TAMC offices and may be obtained upon request. This RFQ is available at the TAMC website ([www.tamcmonterey.org](http://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:** January 28, 2019

**TO:** Interested Consultants

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

**SUBJECT:** Request for Qualifications

**INVITATION**

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

**[project title]**

Please submit one (1) digital copy of your Statement of Qualifications via email to the Transportation Agency for Monterey County, [project manager, email] by **12:00 noon PST on [date]**. Paper copies will not be accepted. Submittals received after the date and time specified above will not be considered.

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

Inquiries relating to this Request for Qualifications shall be submitted to:

[name]  
TAMC Project Manager  
[email]

Email inquiries, including the submittal of the Statement of Qualifications, 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 qualifications will be used by TAMC to select a consultant or consultant team to prepare or assist in the preparation of grant applications for projects in the Measure X Integrated Funding Plan, and other regional priority projects.

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]. This contract will be administered via task orders. 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 review committee to review the statements of qualifications. This review may be followed by an oral interview between a review committee and the firm(s) that respond(s) best to the RFQ. 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.

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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. Statements of Qualifications 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 Statement of Qualifications 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 Statements of Qualifications, 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	<b><u>Firm Profile &amp; Project Team:</u></b> 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	<b><u>Relevant Project Experience:</u></b> 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? <b>[add project-specific descriptors]</b>	20 points
3	<b><u>Specific Approach:</u></b> 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? <b>[modify with project-specific goals]</b>	50 points <b>(45 points if Cost is a factor)</b>
4	<b><u>References:</u></b> Are the firm's references from past clients and associates favorable? Does the firm show financial and operational stability?	10 points
5	<b><u>Cost:</u></b> Is the proposed budget equal to or less than the independent cost estimate? How does the proposed budget compare across submittals? <b>[for non-A&amp;E contracts only]</b>	5 points

**Total of 100 possible points**

**QUESTION & ANSWERS, REQUESTS FOR CLARIFICATION OR EXCEPTIONS, ADDENDA**

This Request for Qualifications and any addenda will be posted on the Agency's website ([www.tamcmonterey.org](http://www.tamcmonterey.org)). Questions and answers regarding the request for qualifications 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 Statement of Qualifications must cite any addenda to be responsive. To receive email notifications of addendums to this Request for Qualifications, prospective proposers must submit an email request to the Project Manager.

Any requests for clarification or exceptions to requirements in this Request for Qualifications must be received by the Agency no later than **12 noon, PST, on [day of the week], [date – suggested 2 weeks prior to due date]**, to guarantee response or consideration. Responses to questions concerning this Request for Qualifications posed before this deadline will be posted on the Agency's website ([www.tamcmonterey.org](http://www.tamcmonterey.org)).

### **SUBMITTAL REQUIREMENTS AND FORMAT**

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

A. Project Team

The statement 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 submittal shall identify the skills of each of the team members and how those skills will be utilized in the work.

B. Demonstrated Knowledge and Experience

The statement shall include the Project Manager and assigned team members' demonstrated knowledge of, expertise and experience in preparing grant applications for SB 1 competitive grants, and other state or federal grants. The statement shall include a review of the projects and programs in the Agency's Integrated Funding Plan and provide a recommendation for possible grant applications.

C. References

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

D. Cost of Services

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

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## **PROPOSED AWARD SCHEDULE**

Notice of Intent to publish Request for Qualifications (RFQ).....	January 10, 2019
TAMC Board approval of Release of RFQ .....	January 23, 2019
Release of Request for Qualifications.....	January 28, 2019
Electronic Statements of Qualifications due to TAMC .....	February 28, 2019 – noon
Review and Ranking of Statements of Qualifications .....	Week of March 4, 2019
TAMC Board consideration of contract .....	March 27, 2019
Contract expiration date .....	June 30, 2022

## **MISCELLANEOUS**

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

Any Statements of Qualifications 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 Statement of Qualifications must be received by the time and date specified above.

### **B. Property Rights**

Any Statements of Qualifications 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 Statements of Qualifications 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 Statements of Qualifications), 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 Statement of Qualifications confidential will be regarded as non-effective and will be disregarded.

### **D. Amendments to Request for Qualifications**

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

### **E. Non-Commitment of TAMC**

This Request for Qualifications does not commit TAMC to award a contract, to pay any costs incurred in the preparation of a Statement of Qualifications 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 Qualifications 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 RFQ 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 contact the Project Manager, [name] at [email, phone].

Attachments:

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