



OZARKS TRANSPORTATION ORGANIZATION
A METROPOLITAN PLANNING ORGANIZATION

Ozarks Transportation Organization
2208 W. Chesterfield Blvd., Suite 101
Springfield, MO 65807
Phone: (417) 865-3042 Ext. 100

REQUEST FOR QUALIFICATIONS: RFQ 001-2016, Regional Bicycle and Pedestrian Trail Investment Study

DEADLINE: Thursday, January 5, 2017 *at 5:00 PM*, Central Standard Time

DELIVERY LOCATION: 2208 W. Chesterfield Blvd., Suite 101, Springfield, MO 65807

PURCHASING AGENT: Debbie Parks, dparks@ozarkstransportation.org

DATE OF ISSUE: Friday, November 18, 2016

REQUEST FOR QUALIFICATIONS

RFQ 001-2016, Regional Bicycle and Pedestrian Trail Investment Study

RFQ shall be submitted in an envelope with the Request for Qualification number and the respondent's name and address clearly indicated on the envelope or by e-mail with "REQUEST FOR QUALIFICATION: #001-2016" in the subject line. All submissions must be submitted by the time and date above.

Respondents are strongly encouraged to carefully read the entire Request for Qualifications.

The undersigned hereby certifies a thorough review of this Request for Qualifications. The undersigned also certifies the firm and key personnel indicated in its Statement of Qualifications will be used on this project in the same manner and to the same extent as so indicated. All statements, representations, covenants, and/or certifications set forth in the Statement of Qualifications are complete and accurate. This offer is not subject to withdrawal by the Proposer unless upon mutual written agreement by the Proposer and the OTO Executive Director.

Name of Firm/Consultant: _____

Contact Person: _____ Title: _____

E-Mail: _____ Phone: _____

Business Address: _____

City: _____ State: _____ Zip: _____

Signature: _____ Date: _____

I. GENERAL INFORMATION

PURPOSE. Ozarks Transportation Organization (OTO) located in Greene County, Missouri requests submissions from firms interested in being selected to develop an investment study for the build out of a regional pedestrian and bicycle trail system within the OTO boundaries. OTO expects to select one firm for the development of this study. OTO receives federal, state, and local grant funding and other funding from local governmental entities.

BACKGROUND. Ozarks Transportation Organization (OTO) Metropolitan Planning Organization (MPO) is the federally designated regional transportation planning organization that serves as a forum for cooperative transportation decision-making by state and local governments, and regional transportation and planning agencies. MPO's are charged with maintaining and conducting a "continuing, cooperative, and comprehensive" regional transportation planning and project programming process for the MPO's study area. The study area is defined as the area projected to become urbanized within the next 20 years.

OTO's Board of Directors includes local elected and appointed officials from Christian and Greene Counties, and the cities of Battlefield, Nixa, Ozark, Republic, Springfield, Strafford and Willard. It also includes technical staffs from the Missouri Department of Transportation, Federal Highway Administration, Federal Transit Administration, and the Federal Aviation Administration and members from public transportation providers and citizen representatives.

The Board of Directors has established a subcommittee to guide development and implementation of the region's Transportation Alternatives Program (TAP), or STP-Set Aside under the FAST Act. The region's TAP program has historically funded small trail and sidewalk projects proposed by member communities throughout the region. During review of the FY 17 application and guidebook, subcommittee members decided to recommend changes to the OTO TAP program. Instead of small projects across the region, members believed it was time to pursue a large-scale regional project. Building out the region's pedestrian and bicycle trail network was the committee's priority. Many committee members referenced the Razorback Trail in Northwest Arkansas as an example of an impactful regional trail system.

OTO's Bicycle and Pedestrian Advisory Committee (BPAC) has identified several potential corridors for future trail development. See <http://maps.republicmo.com/flexviewers/ototrails/> for a map of potential corridors. Recently, the BPAC narrowed the identified corridors to a list of priorities. These priority corridors are seen as candidates for the TAP-funded regional trail system. Battlefield, Ozark, Republic, Springfield, Strafford, and Willard would be served by the identified corridors. Currently, the City of Nixa has not identified viable corridors to connect to the regional system.

OTO is seeking a consultant to help identify and develop a plan for trail corridor implementation and build-out, including best alignments, prioritized order, project costs, and preliminary PEL.

SCHEDULE. The following is the schedule of events which are anticipated by OTO for the implementation and completion of selecting the firm/consultant to provide the requested services as outlined in the Statement of Scope. OTO may, in its discretion, revise the schedule of events at any time as may be in its best interests:

<u>Event</u>	<u>Date</u>
Post Request for Submissions	November 18
Final Questions due from Proposers	December 8
OTO's response to Questions	December 15
Submissions due	January 5
Date for potential interviews	TBD
Date for final selection	Expected January 30

FEES AND PAYMENT. The Ozarks Transportation Organization will begin contract negotiations with the firm determined to be the most qualified. Maximum budget for this project is \$150,000. In the event that a contract cannot be negotiated with the first firm, the Ozarks Transportation Organization reserves the right to negotiate with the next qualified firm(s) until a contract can be reached. The selected firm/consultant will be paid upon satisfactory completion of outlined tasks. Pre-payment is not acceptable. Partial payments will be made upon completion of each task with substantiated invoice.

OTO POLICIES AND PROCEDURES. The following OTO policies and procedures are applicable to the RFQ:

- A. This RFQ does not commit OTO to select a firm/consultant or to pay any costs incurred in the preparation or mailing of the submittal. A failure to award a contract will not result in a cause for action against the OTO.
- B. OTO reserves the right to the following:
 1. To waive minor deficiencies and informalities;
 2. To accept or reject any or all submissions received as a result of the RFQ;
 3. To obtain information concerning any or all proposers from any source;
 4. To request an oral interview from any or all proposers.
 5. If the selected firm/consultant undergoes a change of key personnel, OTO reserves the right to approve any substitute personnel or terminate the services at OTO sole discretion.
 6. To seek new submissions when such a procedure is reasonable and in the best interests of OTO.
- C. OTO complies with Federal Contracting Requirements. A list of applicable contract language can be found on the OTO website:
<http://www.ozarkstransportation.org/RequestforProposals/RequestForProposals.html>.
- D. The OTO follows FTA purchasing guidelines and does not pay retainers or in advance of completed deliverables.

II. SUBMITTAL INSTRUCTIONS

FORMAT OF SUBMISSIONS. In order for the OTO to adequately compare statements of qualifications (SOQ) and value them uniformly and objectively, all SOQs shall be submitted in accordance with the format outlined below. The SOQ should be prepared simply and economically, providing straight-forward and concise information as requested.

1. **Cover Letter.** The complete legal name, address, permanent address and telephone number of the Company including the name of the person to contact for discussion of the submissions. Also, include the RFQ title and due date and time.
2. **Understanding of Project.** Prepare a summary of the Respondent's understanding of the work involved in performing the tasks and services described in the RFQ. Address understanding of the following:
 - *Project goals;*
 - *The complexity, challenges and problems involved in planning and performing the work;*
 - *Approaches and philosophy for dealing with problems;*
 - *Sensitivity and experience dealing with key issues;*
 - *Any additional issues or matters relating to the RFQ which the Respondent believes should be addressed.*

This summary should be no longer than two (2) pages.

3. **Company Overview.** Overview of the firm, including the year founded, office locations, and the number of years in practice. A description of the firm's current staffing should be included. Please describe the firm's current and past financial health. The firm should demonstrate experience in conducting regional trail investment studies, including the identification of preferred alignment, prioritization of corridors, completion of a PEL, and community specific cost estimates.
4. **Team Resumes.** Identify key personnel proposed for this project, describe their qualifications and experience for assigned roles, and identify areas of project responsibility and level of commitment. Include current resumes for key personnel, including any sub-consultants. Please also include expected workloads of key personnel during the anticipated contractual period. (Note: OTO must approve any change in key personnel after the award of a project before the change is made.)
5. **Proposed Work Plan.** Prepare a description of the product and process that would be delivered based on an understanding of project. Include a description of the Respondent's management and organizational approach and methods for performing the tasks and services outlined in the RFQ, including public involvement. Include a timeline by task and how the respondent intends to work with the OTO BPAC to ensure the project is meeting expectations.
6. **Company Workload.** A list of other projects your firm is currently submitting Statement of Qualifications or Proposals. A brief description of other projects your firm is currently working on including percentage of staff dedicated to the project and the project's timeline.
7. **References.** A list of references with phone numbers should accompany the RFQ.

SUBMISSIONS DUE DATE.

One copy will be received no later than **5:00 P.M, January 5, 2017.**

RFQ DELIVERY REQUIREMENTS. Any submittals received after the above stated time and date will not be considered. It shall be the sole responsibility of the proposer to have their RFQ delivered to the Ozarks Transportation for receipt on or before the due date and time indicated. If a qualification submittal is sent by U.S. Mail, the proposer shall be responsible for its timely delivery to the Ozarks Transportation Organization. Qualification submittals delayed by mail shall not be considered, shall not be opened, and shall be rejected. Arrangements may be made for their return at the proposer’s request and expense. Qualification submittals may be emailed and accepted if the signed qualification cover form and required information is received prior to the due date and time.

SUBMISSIONS SEALED AND MARKED. Qualification submittals may be submitted by hand delivery, mail, or by e-mail. Submissions should be received by OTO no later than the delivery deadline. Submissions shall be addressed as follows:

By Mail/Hand delivery:

Ozarks Transportation Organization (OTO)
2208 W. Chesterfield Blvd., Suite 101
Springfield, MO 65807

By E-Mail:

dparks@ozarkstransportation.org

Submissions should be marked in the subject line or on the envelope:

“REQUEST FOR QUALIFICATIONS: #001-2016”

Proposals submitted by e-mail are not to be considered received until a confirmation has been sent by the Operations Manager, Debbie Parks. The confirmation subject line will read, “Confirmation Receipt – OTO RFQ 001-2016.” It is the responsibility of all proposers to verify receipt of submittals. All submittals must be valid for a minimum period of ninety (90) days from the close of this RFQ.

AMENDMENTS. If it becomes necessary to revise or amend any part of this Request for Qualifications, OTO will furnish the revision by notice on the OTO website www.ozarkstransportation.org, not later than five (5) days prior to the date set for receipt of submissions.

III. PROJECT SCOPE

STATEMENT OF SCOPE. It is expected that the selected firm/consultant will perform the following services:

Task 1: Review, Update and Share Current Ownership/Easements along Proposed Corridors

Ozark Greenways, the City of Ozark, and other jurisdictions have conducted research into land ownership, easements (sewer and utility), and rail beds along portions of the proposed corridors. The consultant should review the existing research and fill in any missing or overlooked data with information available through county assessors or online sources. The consultant is not expected to conduct title searches. Finally, a map containing this information should be made available to the TAP Subcommittee and the BPAC. The map shall be, at minimum, 24"x36".

Task 2: Identification of Preferred Alignments for Corridors Prioritized by the BPAC

The consultant shall identify preferred alignments for corridors prioritized by the BPAC. The following shall be considered when identifying preferred alignments:

- *Existing public easements/ land ownership patterns and abandoned rail beds,*
- *geographic/geologic obstacles to bicycle and pedestrian use,*
- *geographic/geologic obstacles to construction activities,*
- *fatal Flaws in each corridor, and*
- *other criteria deemed important by the consultant*

The preferred alignment should utilize public easements, public lands, and intact abandoned rail beds to the largest extent possible. The consultant should review terrain, topographic, line-of-sight, existing traffic patterns/volumes to identify corridors that would discourage "interested but concerned"¹ cyclists from utilizing the trail. Additionally, the consultant should review terrain, topographic, geology, hydrology, line-of-sight, cultural history, and existing traffic patterns/volumes to identify obstacles that would act as a barrier to construction of a trail or make construction cost prohibitive. The fatal flaw analysis will identify not only the obstacle most likely to prevent corridor completion, but should also identify the obstacle most likely to occur on each corridor.

The preferred alignments shall be presented to the BPAC and TAP Subcommittee in map form, including the information identified in **Task 1**. The map shall be, at minimum, 24"x36".

Task 3: Prepare Cost Estimates

Cost estimates should be calculated for each corridor, for each phase of a given corridor, and for each community participating in each phase. Cost estimates should include acquisition of right-of-way, PE/CE, construction and appropriate programmatic elements, i.e. signage or benches. Cost estimates should also include considerations for

¹ Four Types of Transportation Cyclists, Portland Bureau of Transportation, <https://www.portlandoregon.gov/transportation/article/158497>

important design elements at major intersections, along steep slopes or other areas of special engineering or safety concern. Basic concept designs should be included for these areas of special concern. City and County staff engineers can assist with the development of cost estimates if needed.

Total costs for each corridor should be calculated. Each corridor should be broken down into phases costing approximately \$500,000. For each phase, costs should be calculated for each community involved. These costs should be included in a project cost matrix. This matrix will make total costs for each corridor and for each community plainly understandable.

Task 4: Implementation Prioritization

OTO would like the consultant to prioritize the implementation of the regional trail system. Prioritization should occur on two levels: corridor specific and overall implementation. By prioritizing in this manner, regional leaders will learn a logical order for each corridor and a logical order to implement the overall network. It may be more appropriate to extend segments of multiple trails rather than completing an entire corridor in successive years. The consultant should consult with the BPAC during the prioritization process.

The following are criteria to be used in the prioritization process:

- Corridor Readiness
- Cost
- Directness of new connection
- Scenic Value/Historical Value
- Others deemed appropriate by consultant

The BPAC should determine the weight assigned to each criterion included in the prioritization process.

The results of the prioritization process should be shown in an implementation matrix. The matrix should include scores, corridor-level priority, and overall priority.

Task 5: Completion of PEL Questionnaire

Efforts should be made by the consultant to provide linkages between the planning/prioritization phase and the project development/NEPA (National Environmental Policy Act) phase of implementing the regional trail network. The consultant is not required to fully comply with all aspects of NEPA. There are a minimum of five NEPA areas that can be partially addressed during this planning process:

- Purpose and Need
- Mode Identification
- Description of Environmental Setting
- Identification of Alternatives/Preferred Alternative
- Consideration of Cultural and Environmental Resources
- Public Involvement

Priority should be given to the completion of Task 1 through 4.

(1) Specifically, the consultant should develop, and support with local data sources, a statement of *purpose and need* of this project. Local sources include the newly adopted *Transportation Plan 2040* and the most recent *Bicycle/Pedestrian Implementation Report*. (2) The purpose and need statement should also identify the transportation mode best suited to meet the identified need. (3) A basic *description of the environmental setting* should be developed during the completion of this project. (4) Additionally, the consultant should clearly identify, and explain *alternative solutions*, along with the process used to select a *preferred alternative*. (5) Where possible, the consultant should include *floodplains, historic properties, critical habitats*, and other resource types in the selection process. (6) The consultant, in collaboration with OTO, should involve the public during the completion of this study. (See Task 6).

All efforts made by the Consultant, and OTO, to create these linkages should be documented by completing an FHWA [PEL Questionnaire](#). Budgetary constraints may prevent PEL activities from fully complying with NEPA requirements. Additional review and analysis will be done the project development phase if needed.

Task 6: Public Involvement

The public and the BPAC will be provided a minimum of two opportunities to provide input on the development of the Investment Study. Minimum involvement includes input during:

- the identification of preferred alignments
- the prioritization process

Additional meetings can be held at the consultant’s discretion. These meetings will help fulfill NEPA requirements for public input.

Efforts should be made to minimize the cost of the public involvement by collaborating and partnering with OTO and member communities. The consultant will determine roles and responsibilities for an effective and efficient public involvement process, including the completion of the PEL Questionnaire. The consultant must attend the Prioritization process meeting.

The following graphics should be created by the consultants for the public involvement process:

Preferred Alignment:

- Map of each corridor
- Map of proposed network
- Bulleted list of key considerations for each corridor
- Identified Fatal Flaws and Challenges

Prioritization:

- Finalized map of network
- Graphics showing concept design for important intersections or areas of special concern
- Cost breakdowns for network and individual corridors
- Proposed structure for prioritization matrix

TIMELINE CONSIDERATIONS. The following dates represent key milestones for the investment study.

- February 28- Consultant Selected and Contract Signed
- March 30- Task 1 Complete
- April 28- Task 2 Complete
- May 30- Task 3 Complete
- June 30- Task 4 Complete
- July 31, 2017- Completed Draft Study Submitted to TAP Subcommittee

DELIVERABLES. The consultant will have provided the following deliverables at the conclusion of the study:

- Map showing current ownership/easements along trail corridors, min. size 24 x 36 inches
- Map showing preferred alignments, min. size 24 x 36 inches
- Electronic report documenting needed right-of-way, reasoning and results of preferred alignment review, PEL questionnaire and associated documentation, cost estimates, implementation prioritization, and documentation of the public involvement process, including comments received.
- Shapefiles of all relevant project data. For preferred alignments, please include prioritization information and cost estimates.

IV. ADDITIONAL INFORMATION

PROJECT CONTACT. During the project, the main OTO contacts will be:

Andy Thomason, Planner
Sara Fields, Executive Director

OTO reserves the right to conduct pre-award discussions with any or all responsive and responsible proposers who submit submissions determined to be reasonably acceptable of being selected for award. Proposers shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of submissions; and such revisions may be permitted after submission of qualifications and prior to award.

SUBMISSIONS EVALUATION PROCESS. OTO will evaluate submissions. Each submittal will be evaluated for full compliance with the RFQ instructions to the proposer. The objective of the evaluation will be to recommend the most qualified firm/consultant who is most responsive to the herein described needs of OTO. Submissions which are responsive to this Request for Qualifications will be evaluated based on, but not limited to the following criteria:

- A. The firm's general experience, stability, and history of performance on projects similar to that under consideration, including projects in regions with populations similar to the OTO area (0-15 points)
- B. Relevant experience of the key individuals who will be assigned to this project. (0-15 points)
- C. Level of project understanding demonstrated by Consultant (0-10 points)

- D. Method proposed by Consultant to complete project (0-15 points)
- E. Ability of the consultant to meet required timetable (0-10 points)
- F. The overall quality and completeness of statement of qualifications (0-5 points)

PUBLIC RECORDS. All proposals submitted in response to this RFQ become the property of OTO and public records and, as such, may be subject to public review after the final firm/consultant is selected.

QUESTIONS REGARDING SPECIFICATIONS OR SUBMISSIONS PROCESS. To ensure fair consideration for all proposers, OTO prohibits communication to or with any board or employee during the submission process, except as provided below. Additionally, OTO prohibits communications initiated by a proposer to OTO official(s) or employee(s) evaluating or considering the submissions prior to the time an award decision is made. Any communication between proposer(s) and OTO will be initiated by the appropriate OTO Official(s) or employee(s) in order to obtain information or clarification needed to develop a proper, accurate evaluation of the submissions. Such communications initiated by a proposer may be grounds for disqualifying the offending proposer from consideration for award of the submissions and/or any future submissions(s).

- A. Any questions relative to interpretation of specifications or the submissions process shall be addressed to Debbie Parks in writing via email (dparks@ozarkstransportation.org), in ample time before the period set for the receipt and opening of submissions. Any interpretation made to prospective proposers will be expressed in the form of an amendment to the RFQ which, if issued, will be conveyed to all prospective proposers not later than five (5) days prior to the date set for receipt of submissions via the OTO website, www.ozarkstransportation.org.
- B. It will be the responsibility of the proposer to contact OTO prior to submitting a proposal to ascertain if any amendments have been issued, to obtain all such amendments, and to acknowledge amendment with the submissions.



For persons with disabilities needing reasonable accommodations please contact OTO at 417-865-3042 at least 48 hours in advance of the question deadline. If you need relay services please call the following numbers: 711 - Nationwide relay service; 1-800-735-2966 - Missouri TTY service; 1-800-735-0135 - Missouri voice carry-over service.