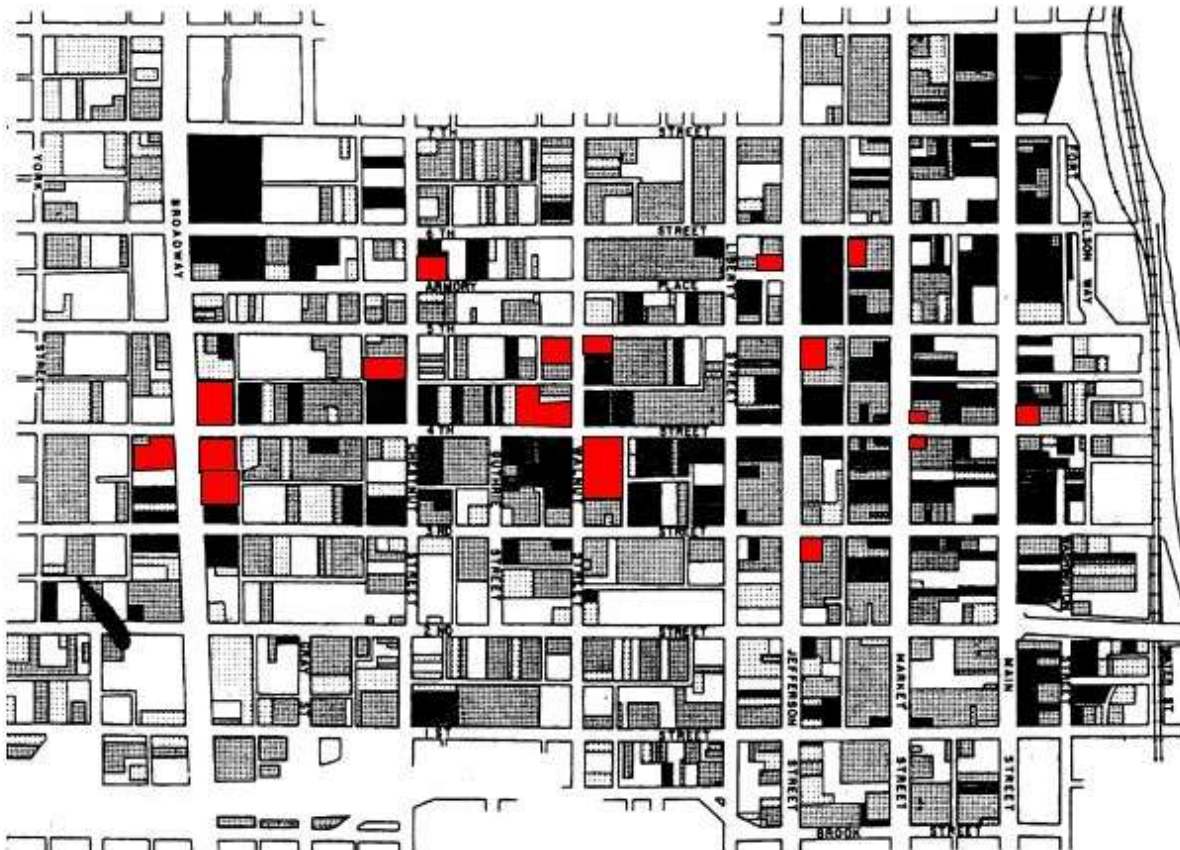




STATEMENT OF QUALIFICATIONS

January 13, 2014



**Local Planning Resource Program Pool
Statement of Qualifications**

Please direct all questions regarding this Statement of Qualifications (SOQ) to either Val John Halford or Julia Collins using the contact information provided below:

1. **WFRC Contact Persons:**
- Val John Halford
Program Administrator
Wasatch Front Regional Council
295 North Jimmy Doolittle Road
Salt Lake City, Utah 84116
Telephone: (801) 363-4230, ext. 1108
E-Mail Address: vhalford@wfr.org
- Julia Collins
Program Administrator
Wasatch Front Regional Council
295 North Jimmy Doolittle Road
Salt Lake City, Utah 84116
Telephone: (801) 363-4230, ext. 1126
E-Mail Address: Julia@wfr.org

Please provide the following contact information below.

2. **Project Contact Person:**
- Contact Person:
Title:
City/County/Other:
Address:
Telephone:
Fax Number
Email Address:
3. **Advertisement Dates:** The SOQ will be released on Monday, January 13, 2014 and available through Wednesday, February 5, 2014 on the WFRC website.
4. **SOQ Deadline:**
Deliver five (5) hard copies and one electronic PDF file through an email, on a CD or flash drive of the SOQ (unless directed otherwise) to Julia Collins, Wasatch Front Regional Council at the address below no later than 3:00 PM on **Wednesday, February 5, 2014.** Electronic portion of the submittals may be e-mailed to the address below:

USPS Mail
Julia Collins
Contract Administrator
Wasatch Front Regional Council
295 North Jimmy Doolittle Road
Salt Lake City, Utah 84116

E-Mail Address
Julia@wfr.org

Late Submissions will not be accepted.

**Local Planning Resource Program Pool
Statement of Qualifications**

- 5. **Evaluation Based Selection:** This is a qualifications and evaluation based Selection process based on the information provided in Appendix A - *Overview of Local Planning Resource Program*. Refer to Appendix B - *Consultant Selection Process* for additional information.
- 6. **Type of SOQ Required:** All SOQs submitted should be prepared in accordance with Appendix C - *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 e-mail list. The SOQ has a maximum limit of **10** pages (with 2 additional pages allowed per project category).
- 7. **Evaluation Criteria:** SOQs will be compared and evaluated based on the criteria identified in Appendix C.
- 8. **Consultant Pool:** Selected consultants will form a pool of preapproved firms that will be available for the Local Planning Resource Program. The project consultant pool will be utilizing consultants on an as needed basis to address requests by specific Local Planning Resource Program applicants. Being part of the consultant pool qualifies consultants for work within the Local Planning Resource Program. The pool will be in effect for up to three years, pending continuation of the Program.
- 9. **Forms:** Examples of Local Planning Resource Program Consultant Services forms referred to throughout this SOQ are available on the WFRC website:
http://wfrc.org/new_wfrc/index.php/wfrc-programs/local-planning-resource-program.

Consultant Selection Schedule

DATE	ACTION
January 10, 2014	Advertisement of the SOQ begins
January 16, 2014	Question and Answer Conference Call
February 5, 2014	SOQs are due by 3:00 PM.
February 7, 2014	SOQ Selection Team Meeting
February 11, 2014	Notification of Consultant Selection

**Local Planning Resource Program Pool
Statement of Qualifications**

APPENDIX A

Overview of Local Planning Resource Program

Introduction

The Wasatch Front Regional Council (WFRC) in partnership with Salt Lake County seek Statements of Qualifications from consultant firms or person to form a Pool to provide local planning and technical assistance to local government applicants that qualify under the guideline of the Local Planning Resource Program. A variety of specialized planning expertise is needed to address a wide range of land use and transportation planning related issues and projects. The type of technical assistance available will be listed below under the heading “Project Eligibility” The firms selected for the Pool will work directly with the Wasatch Front Regional Council in partnership with Salt Lake County and representatives from local municipalities. WFRC in partnership with Salt Lake County and local government recipients will work with communities to develop both a scope of work and project budget. The project consultant pool will be utilized as a resource and on retainer to address specific requests by Local Planning Resource Program applicants. This pool of selected applicants will be in effect for up to three years, pending continuation of the program.

Program Description

Both Wasatch Front Regional Council and Salt Lake County seek to support local governments to fulfill their desire to create livable and vibrant communities. Consistent with that goal, WFRC and Salt Lake County have adopted the Wasatch Choice For 2040 (WC2040) Regional Growth Principles and Vision. WC2040 promotes coordination of transportation infrastructure with land use development, including mixed-use centers, TODs, corridor development, and employment centers.

The Local Planning Resource Program (“Program”) has been created in partnership between WFRC and Salt Lake County to help support local governments in their efforts to plan for, and implement livable communities that are consistent with the shared WC2040 Vision and the Regional Growth Principles. The Program is also intended to help communities enhance their existing centers and corridors, while simultaneously reducing vehicle miles traveled and improving air quality.

The Local Planning Resource Program is available to municipalities, counties or townships, and multijurisdictional groups within the Wasatch Front Regional Council area of responsibility (Box Elder, Davis, Morgan, Salt Lake, Tooele, and Weber Counties). The Local Planning Resource Program Partnership encourages applications from two or more jurisdictions working together, within county boundaries. Many communities in the Wasatch Front have difficulty allocating adequate resources to plan for their futures as proactively as they would like. At the same time, quality and timely planning is necessary for our Region’s continued economic prosperity. For the first time, WFRC and Salt Lake County has funded a program that is designed to make planning assistance, staff resources, and direct financial assistance available for community-based projects. The Local Planning Resource Program will utilize local consultants who are willing to provide the type of specialized assistance needed in certain specific cases.

Local Planning Resource Program Pool Statement of Qualifications

Types of Resource Assistance Offered

There are four types of resource assistance offered through this program.

- 1) The Local Planning Resource Program partners organizational staff time or consulting firm assistance through a preselected pool of consultants. The Local Planning Resource Program Partners are available to assist local jurisdictions in consultant selection and contract management.
- 2) Training (e.g., work sessions to learn Envision Tomorrow Plus or the Form-Based Code template)
- 3) Technical support (e.g., GIS services or scenario modeling)
- 4) Direct financial assistance is available in limited quantities.

Program Goals

The goals of the Local Planning Resource Program are to:

1. Support local outreach and engagement efforts that promote broader stakeholder involvement.
2. Encourage coordination of land use plans with existing or planned regional transportation infrastructure.
3. Reduce single-occupant vehicle travel demand and promote alternative travel choices through land development strategies.
4. Promote plans and projects that support and implement the Wasatch Choice For 2040 vision and growth principles.
 - a. Integrate local land use with regional transportation systems
 - b. Provide regional mobility through a variety of interconnected transportation choices
 - c. Provide public infrastructure that is efficient and adequately maintained
 - d. Provide housing for people in all various stages of life and income levels
 - e. Ensure public health and safety
 - f. Enhance the regional economy
 - g. Promote regional collaboration
 - h. Strengthen sense of community
 - i. Protect and enhance the environment
5. Support the use of Wasatch Choice For 2040 tools (Envision Tomorrow Plus, Form Based Code, Housing Plans, Transit Oriented Development Financing, Complete Streets, Green Infrastructure, TravelWise, etc.) in local planning efforts.
6. Promote collaboration

Wasatch Choice For 2040 Toolbox

The Wasatch Front Regional Council has adopted the Wasatch Choice For 2040 Regional Vision and Growth Principles that address desirable relationships between transportation and development patterns. In addition, the WFRC and members of the Wasatch Choice For 2040 Consortium developed tools to help communities more easily and effectively plan and implement their plans. These tools include the Envision Tomorrow Plus (ET+) scenario planning software, a Form Based Code template (FBC) (model code document and guide to code calibration), a Regional Housing Analysis (including an analysis of impediments and housing equity analysis), Implementing Centers tools (financial methods/ tools to finance transit oriented development infrastructure), a Complete Streets Dialog Tool (web based tool to visualize/test different street cross sections), Transit Preparedness Index (assesses city efforts to be served by transit), Green Infrastructure (open space evaluation tool),

Local Planning Resource Program Pool Statement of Qualifications

TravelWise activities (strategies that encourage people to use alternatives to driving) and others.

In order for Wasatch Choice For 2040 to be successful, local communities need to utilize the Wasatch Choice For 2040 Vision and apply it at the local planning level. Applying the resources found in the Wasatch Choice For 2040 Toolbox will enable communities to implement the Vision and Growth Principles according to their individual community goals and aspirations. A number of planning tools have been developed to help in this effort. These tools include:

1. Envision Tomorrow Plus (ET+)
2. Form Based Code (FBC)
3. Implementing Centers
4. Moderate Income Housing Plans
5. Complete Streets
6. Green Infrastructure

Community representatives and consultants can learn more at www.wasatchchoice2040.com

PROJECT ELIGIBILITY

Assistance is available to municipalities, counties, townships, and multijurisdictional groups of local governments within the Wasatch Front Regional Council area of responsibility (Box Elder, Davis, Morgan, Salt Lake, Tooele, and Weber Counties). The WFRC encourages applications from two or more jurisdictions working together, within county boundaries.

Eligible projects include but are not limited to:

- Developing local “visions” or plans consistent with the WC 2040 Vision
- Using Envision Tomorrow Plus (ET+) to generate land use scenarios for planning purposes
- Projects that involve multijurisdictional coordination
- Activities that help to implement previously-adopted plans, such as revisions to ordinances or other land use regulations.
- Assistance with public participation related to developing or implementing local plans.
- Site assessments to determine feasibility of transit oriented development projects
- Studies or specific plans related to important local issues, such as housing or market studies.

Non-Eligible Projects

Project phases such as land acquisition, engineering, or capital investment, are not intended to be pursued through the Wasatch Choice For 2040 Local Planning Resource Program.

**Local Planning Resource Program Pool
Statement of Qualifications**

APPENDIX B

Consultant Selection Process

Overview:

The WRFC and Salt Lake County staff will select consultants for the Pool through an evaluation based selection process. The primary factor in selection is the qualification-based criteria outlined by the SOQ Selection Team in Appendix C - *Guidelines for Preparing a Standard Statement of Qualifications*.

The Consultant Selection Team will review and evaluate submitted SOQs. SOQs are ranked for qualifications, based on pre-determined criteria. If the Consultant Selection Team determines that interviews are needed in order to determine final consultant selection, then interviews will be conducted (Please be available on February 7, 2014 from 10:00 A.M. to 12:00 P.M.). Final ranking will be determined by the average of the Consultant Selection Team members' scores from SOQs and the Consultant Selection Interviews.

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 and education levels of the individuals proposed for use on this contract.

Required Standard SOQ Contents

The SOQ from the Consultant should contain the information identified in Appendix C - *Guidelines for Preparing a Standard Statement of Qualifications*.

Standard SOQ Evaluation Procedures

The Consultant Selection Team will evaluate the SOQs in accordance with the criteria described in the section below entitled "Selection Criteria."

Conditions of Proposal

All costs related to the preparation of the Standard SOQ and any related activities, such as interviews, 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 Local Planning Resource Partnership and are treated as protected documents, and are disposed of according to WRFC policies. The Local Planning Resource Program Partners reserve the right to reject all SOQs. The SOQ of the successful Consultants shall be open to public inspection for a period of one year after award of the contract. SOQs of Consultants who are not awarded a contract shall not be open to public inspection and will be destroyed once the contract is executed with another consultant.

Project Categories

Local Planning Resource Program Pool Statement of Qualifications

Consultants are invited to submit project references or relevant work qualifications for each of the following project categories they feel capable to undertake. A Consultant may submit multiple categories, but should address each category independently. Two additional pages are allowed for each category the consultant submits for. The Consultant Selection Team will then evaluate the consultant for each category separately and create a consultant pool for each of the project categories.

1. Multi-jurisdictional Projects (i.e. a corridor plan)
2. Local Government staff training related to the Wasatch Choice For 2040 toolbox.
3. Technical Assistance to support a local planning process.
4. Comprehensive Planning (either in whole or part).
5. Ordinance Writing.
6. Public Participation.

Selection Criteria

The Consultant Selection Team will use the following selection criteria in regard to the above six project categories:

1. *Experience of the Staff Assigned: (40 Points)* Firms will be evaluated according to the current and past experience of the individuals assigned to this project relative to the selected project category.
2. *Qualifications of Staff Assigned: (40 Points)* The professional qualifications and time availability of the staff assigned to manage and conduct the project will be reviewed.
3. *Experience with the Wasatch Choice For 2040 Toolbox: (20 Points)* The proposal will also be reviewed for related experience with the specific elements of work and familiarity with the Wasatch Choice For 2040 related tools within each of the project categories.

**Local Planning Resource Program Pool
Statement of Qualifications**

APPENDIX C

Guidelines for Preparing a Statement of Qualifications

Introduction:

These guidelines were developed to standardize the preparation of SOQs by Consultants for Local Planning Resource Program projects. Submitting a SOQ is the beginning of the selection process and is used as the basis for selecting or for short-listing Consultants. If the Consultant Selection Team determines interviews are necessary prior to selection, you will be contacted and invited to an interview by the Consultant Selection Team on February 7, 2014 from 10:00 AM to 12:00 PM. A Question and Answer conference call regarding the SOQ process will take place on January 16, 2013 from 12:00 PM. to 1:30 PM.

The purpose for these guidelines is to assure consistency in format and content in SOQs prepared by Consultants and submitted to the Consultant Selection Team. Preparing a SOQ instead of a detailed proposal reduces the time requirements for Consultants and simplifies the review process for the Consultant Selection Team.

Submission of SOQs:

SOQs must be delivered to the WFRC office. Mail or delivery information is provided.

Standard SOQ Sections:

All SOQs should contain the following sections in the order listed.

1. Cover Page
2. Project Team (Experience of the team members relevant to the project category.)
3. Capability of the Consultant
4. Familiarity with the Wasatch Choice For 2040 Tools

Cover Page

The Cover Page is one page. It must consist of information found in the table on the following page with no additional information. The information is not required to be in this exact format. If there is any other information provided on the Cover Page, the SOQ will not be considered.

**Local Planning Resource Program Pool
Statement of Qualifications**

COVER PAGE	
Date	
SOQ Name and Description	
Consultant Firm	
Consultant Firm's Federal ID Number	
PRIMARY CONTACT INFORMATION	
Primary Contact Person	
Address	
City, State, Zip Code	
E-Mail Address	
Office Phone	
Cellular Phone	
SECONDARY CONTACT INFORMATION	
Primary Contact Person	
Address	
City, State, Zip Code	
E-Mail Address	
Office Phone	
Cellular Phone	

Project Team

The Consultant Selection Team will consider how well the qualifications and experience of the proposed team members relate to the specific project. The following information should be provided.

- Describe the qualifications, education, and experience of key personnel on your proposed project team.
- Provide a spreadsheet list of projects **completed** by key team members during the last five years. The spreadsheet column headings should include the following items.
 - Name of Project Manager
 - Year
 - Type of Project
 - Project Name
 - Project Location
 - Project Description
 - Construction or Project Cost Estimate
 - Services Performed / Specific Project Role
 - Client
 - Reference Contact and Telephone Number

Capability of Consultant

The Consultant Selection Team will evaluate the Consultant's capability to perform the work.

- Describe your firm's ability to perform the work of the project category

Local Planning Resource Program Pool Statement of Qualifications

(see page 8).

- Describe any unique qualifications your firm has to perform this type of work.
- Describe your firm's internal quality and cost control procedures.
- Describe your firm's experience with the specific type of work of the project category
- Identify the location of the main office of the proposing firm and the logistics relating to how the project team will provide the services requested.
- Describe the overall performance record of the proposed project team firms.

Familiarity with the Wasatch Choice For 2040 Tools

Describe your firm's experience or familiarity with the Wasatch Choice for 2040 Vision, Growth Principles, and Toolbox.

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 Selection Team.

1. Five (5) SOQ Hard Copies
2. One Electronic PDF File of SOQ submitted through email, on a CD or flash drive – Label with the Consultant Name, Project Number, Project Location, and Submittal Due Date. This electronic file may instead be emailed to Julia@wfrfc.org
3. Color is allowed.
4. 8-1/2" X 11" Page Sizes
5. Related Experience Chart and Project Organization. (Chart is required).
6. Cover Page – Is required as the first page of the PDF, but does not count towards the page maximum. The Cover Page may be presented in any format the Consultant chooses, i.e. text, chart, etc. No additional informational information is allowed than specified on page 10.
7. Bind SOQ on 11" Left Side.
8. Front and Back Covers are allowed – Information on the front and back covers is not restricted. Cover page will not count towards the page maximum.
9. Send SOQs to the Program Administrator Julia Collins, identified on page 2.
10. The Standard SOQ is expected to consist of the following:
 - Cover Page (one page)
 - SOQ (10 pages, including the *Project Experience Chart*)
 - 2 additional pages for each project category submitted.
11. Late Submission – Is defined as any SOQ received by the Consultant Selection Team after the February 5, 2014, 3:00 PM deadline.

Local Planning Resource Program Pool Statement of Qualifications

12. Other – The Consultant Selection Team reserves the right to disqualify an application when the intent of the process is not adhered to.

Summary:

The SOQ should be clear, concise, and it should provide the Consultant Selection Team with an understanding of the Consultant's ability to undertake and complete the proposed project in a thorough and timely manner.

Consultant SOQ Selection Team:

The Consultant Selection Team members will receive copies of each responsive SOQ submitted. They will review and score the SOQs individually based on the "Selection Criteria" found in Appendix B and submit their scores and comments to the Program Administrators. The Administrators will tally and compile the scores and comments. Scores submitted by individual Selection Team members are static. Scores will only be changed if there is a discrepancy between a Consultant Selection Team member's score and what has been recorded by the Program Administrators.

Final SOQ score results are determined from the average of voting Consultant Selection Team members' scores. The selection team may need questions answered relative to the submitted qualifications. Please make a representative of your team available by phone on February 7, 2014 from 10 A.M. to 12:00 P.M. to answer questions from the selection committee.