



Request for Qualifications

On-Call Transit Planning Services

2023-2024

REQUEST FOR QUALIFICATIONS (RFQ)

On-Call Transit Planning Services

RECEIPT OF RESPONSES

Lee/Ogle Transportation System (hereinafter referred to as “LOTS”) requests sealed responses for qualification based on-call transit planning services. Sealed responses are due by Friday, March 24, 2023 at 4:00 P.M. Each consultant shall submit sealed response documents as detailed below “RFQ Submittal Requirements”. Staff will not publically open responses.

STATEMENT OF NEEDS

LOTS seeks qualifications for route, compliance, funding, and capital transit planning services for years 2023-2024. Potential planning services include transit asset management, maintenance and operations facility site assessment and feasibility study, identification of transit improvements, and other transit planning services. LOTS intends to pre-qualify approximately 3-5 firms to contract with on an as-needed basis.

General project descriptions are available under the Scope of Services starting on page 2. The project descriptions demonstrate LOTS’s need for a variety of engineering services. Project descriptions will allow candidates to correlate their skills and expertise with upcoming project types.

Upon review committee’s approval of projects, staff will choose the three most qualified candidates for the project. Based on the scope of work, LOTS will negotiate a proposal with the most qualified candidate. If staff cannot reach consensus, LOTS will work with the second most qualified candidate and continue to the third most qualified candidate if necessary.

RFQ SUBMITTAL REQUIREMENTS

1. Please submit one sealed envelope containing your RFQ responses to the section titled **RFQ Response Template**. Format the RFQ responses according to the above-mentioned template. Each consultant shall be required to submit Four (4) original hard copies.
2. Please submit sealed RFQ response by **March 24, 2023, 4:00 PM** to:

Lee/Ogle Transportation System
Steve Davis – Assistant Manager Business Development
210 E. Progress Drive
Dixon, IL 61021
Office: 815 288-2117
Email: sdavis@lotsil.org

SCOPE OF SERVICES

LOTS is seeking **On-Call Transit Planning consultant(s)** for each service outlined below. The Planning consultant(s) will document their ability to incorporate and administer a full range of technical consultant services into their work as well as work with LOTS staff or other consultants on projects as needed. The successful firm(s) will need to be able to project and coordinate the following services:

- **Short and Mid-term planning** to update, modify, and create plans for near and mid-term projects.
- **Technology planning and development** to incorporate data and information into existing system.
- **Capital project planning** to update or create conceptual design and financial plans for capital enhancement improvements including shelters, transit maintenance and operations facilities, vehicles, and other capital assets.
- **Scheduling** for existing and future services.
- **Survey work and analysis** such as on-board surveys, origin-destination analysis, customer satisfaction, and ridership data.
- **Compliance Planning** and analysis such as Title VI, Safety Management System, National Transit Database and other Federal or State required reporting documents.
- **Service costing and modeling** including funding options, financial projections, prioritization of projects for the development of new or modified services.
- **Service performance methodology** to be available for analysis for various short and long-range planning applications.
- **Paratransit/demand-response** planning specializing in planning strategies for complementary paratransit service meeting ADA, Federal, and State mandates and for innovative service delivery methods including scheduling assistance.
- **Funding sources** which include investigating strategies to supplement local funding sources along with modeling the potential revenue.
- **Safety and security** planning to include the development of required safety planning documents.
- **Procurement consulting** assistance to ensure LOTS is complying with all rules and regulations.
- **Policy development** assistance for transit specific organizational policies.
- **Grant application development** for potential discretionary grant opportunities.
- **Strategic planning** including the development and facilitation of a strategic plan.

ON-CALL PLANNING CONTRACT

The agreement will be a task order contract with an obligation for service being based on the issuance of a specific Task Order(s) with detailed scope of services and cost information. LOTS is not obligated for services until a work order is issued and executed. The estimated amount of the contract is not to exceed \$10,000 per year; however, the actual amount may be less, and LOTS does not guarantee a minimum annual level of compensation to the awarded firm.

The On-Call Planning Contract will be a negotiated instrument and is an umbrella contract that does not designate specific projects or tasks of services. The contract establishes a relationship, specifying terms and conditions of employment, as well as establishing negotiated hourly rates for different professional, technical and administrative classifications of personnel proposed to be available for performance of work.

The services may not be on a constant, continuous basis, but rather on an as-needed, on-call basis, during the term of the Contract. The Consultant will provide services pursuant to negotiated task order. Each task order may vary in its size and scope and may entail providing a single support staff perform for limited durations. Each work order will be issued on a fixed-price basis.

The On-Call contract is NON-EXCLUSIVE. LOTS expressly reserves the right to contract with other consultants and contractors for performance of the services described in this RFQ. LOTS retains and does not vacate any discretionary rights or authority because of any On-Call Contract for specified services.

The Consultant's project manager will represent the consultant's team and be the primary contact responsible for all transmittals and communications to LOTS Project Manager. Likewise, LOTS Project Manager will represent LOTS as the primary contact responsible for all transmittals and communications to the consultant.

The consultant will notify LOTS whenever there is a new sub consultant added to the existing task order or to the contract, and submit their position loaded hourly rates. Prior approval from LOTS is required before the new sub consultant can be added to the current contract or task order.

TASK ORDER PROCESS

As the need arises, LOTS will send a request summarizing the proposed Scope of Work to the selected firm(s) for each category. The selected firm shall prepare a written draft submittal in response to each work task request. The response to LOTS's request will be discussed and adjusted as necessary. Once the scope is agreed upon by both LOTS and the consulting firm, the firm will finalize the task order and compensation will be negotiated. A form task or work order will be issued at that point.

VENDOR REQUIREMENTS

LOTS will require the selected firm(s) to perform the following:

- Work with various LOTS administration associated with the projects.
- Have a designated liaison to coordinate all projects and provide assistance when needed.

- Ensure all project deliverables are completed on or before established completion dates.
- Ensure any update to the project deliverable is approved for such changes by the assigned project manager.
- Provide (upon request) written monthly status and progress reports identifying major accomplishments, issues, planned activities, and status of deliverables and milestones.

RFQ RESPONSE TEMPLATE

Use the template below to submit the following information in this format and order.

Section I – Introduction to Firm

1. Please introduce your firm. Provide a brief overview of company history, company size, company officers, and annual volume of similar work. Highlight specialized fields or features that differentiate your services from competitors. Discuss how the specialized services will assist LOTS with future projects.

Section II – Projects/Services

1. List and briefly describe any ongoing or past projects completed with LOTS if any. Use project examples to demonstrate your approach to these projects and future projects described in the scope of services section. Include substantive or innovative ideas used in past projects or any upcoming projects.
2. For project examples, include a description, associated project challenges, project services offered, and critical information to demonstrate approach and application.
3. Briefly describe services not listed in the scope of services the consultant can provide on future projects.
4. Limit project examples within last five (5) years.

Section III – Approach to Service Delivery

1. Describe how the philosophy or methodology used by your firm applies to our upcoming projects.

Section IV – Resumes and Organization

1. Introduce key members of the team LOTS will work with. Identify the primary client contact. Please include resumes for the identified individuals.
2. Provide an organizational chart identifying disciplines, specific personnel and role of individuals assigned to each project type.

Section V – References

1. Please provide at least three (3) recent and relevant references for LOTS to potentially contact about your service profile.

RESPONSE REVIEW AND SELECTION

LOTS’s project evaluation team will review and evaluate the RFQ responses in accordance with the weighted evaluation criteria identified below. Staff will also check references. LOTS staff may request an in-person interview of representation from your organization.

- Services – 20%
- Qualifications and Experience– 20%
- References and Resumes – 10%
- Affiliations and Accreditations – 10%
- Local Office and Knowledge of Area and Services – 15%
- Past Performances with City and similar municipalities – 15%
- Ability to Perform Multiple Functions (which could lead to cost savings and uniformity for City) – 10%

RFQ SCHEDULE

Task	Timeline
Issue RFQ	February 20, 2023
Questions due	March 13, 2023
Responses due	March 24, 2023
Evaluation committee meets *	March 27, 2023
Selection of consultant pool *	March 29, 2023
Award, agreement, and notice to proceed	Project specific

* Staff may require scheduling modifications to accommodate unforeseen scheduling conflicts.

QUESTIONS

Please direct all questions to:

Lee/Ogle Transportation System
 Steve Davis – Assistant Manager Business Development
 210 E. Progress Drive
 Dixon, IL 61021
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 Email: sdavis@lotsil.org