

Berkeley Charleston Dorchester Council of Governments
Regional Transit Framework Plan
REQUEST FOR QUALIFICATIONS
March 14th, 2017

I. INTRODUCTION TO AGENCY/PROJECT OBJECTIVE

The Berkeley-Charleston-Dorchester Council of Governments (BCDCOG) is an association of local governments that assists in planning for common needs of the three counties and municipalities therein in coastal South Carolina for sound regional development. Appendix A provides a map of the BCDCOG region. In 2012, after several years of planning efforts, the BCDCOG and its jurisdictional stakeholders adopted a vision known as OurRegion OurPlan (OROP) that provides a framework for growth in the tri-county region. OurRegion OurPlan was established because of intense gains in regional employment before, and even during, the great recession and an overall population explosion as one of the fastest growing regions in the country. This growth continues and is forecasted to be consistent over the next few decades. Effects of the growth have been most evident in levels of congestion on the regional road network, caused principally by expansion of the urbanized areas further away from the Charleston peninsula but also by increased movement of goods associated with establishment of large manufacturing facilities and growth in the tourism industry. The regional plan (OROP) provides a mechanism for systematic management of future growth and expansion of the regional transportation system. However, it recognizes that the regional transportation system must become increasingly multi-modal to provide options that relieve conflicting demands by freight, residents and tourists. A key objective called out in the Regional Plan's section on Mobility and Transportation Infrastructure is development of a Regional Transit Framework (RTF). Therefore, BCDCOG is seeking qualified firms to lead the effort in developing an implementable RTF that will help alleviate the issues that have arisen with acute growth.

I. PROJECT BACKGROUND AND LOCATION

Initiative to develop a regional transportation system that is multimodal with a transit system that attracts and serves new passengers and improves service for existing riders that is shared by major stakeholders in the region. The Metro Charleston Chamber of Commerce, Charleston Regional Development Alliance and other partners listed development of a multimodal transportation system as one of the key takeaways from the 2015 annual Regional Economic Scorecard. This sentiment has broad-based support with the Charleston business community, political entities, and citizens within the region, an alliance which is mandatory for transformational change to occur.

In 2016, the BCDCOG concluded two significant transit-related studies that form the basis of the proposed Transit Framework Plan. The I-26ALT study of a fixed guideway transit system (www.i26alt.org) focused on exploring dozens of combinations to identify a preferred alignment and transit mode to serve as a "spine" for a premium transit system that will serve the region in the future. That plan seeks to achieve a system that will support our regional economy by managing transportation demand along the I-26 corridor by providing an alternative for residents and employees to travel

between Summerville, North Charleston and Charleston. The study also identifies key transit hubs for operations along the spine which will provide investment opportunities for high-density mixed-use developments needed to sustain transit along the corridor. More importantly, these hubs can serve as connection or transfer points to additional premium transit services along other key corridors in the region and feeder bus routes. Concurrent with the I-26ALT, a comprehensive operational analysis (COA) of the existing urban transit provider (CARTA) was conducted identifying areas of improvement to route efficiencies. Proposed route adjustments resulting from the COA were implemented in May, and again in September, of 2016 and adjustments are now being assessed and implemented to provide effective transfers from the rural area transit (TriCounty Link) routes to CARTA.

It is expected that the RTF will build off of these ideas and goals to produce an actionable plan for the region that will complement the Charleston Area Transportation Study Metropolitan Planning Organization (CHATS MPO) Long Range Transportation Plan (LRTP) which will be updated in 2017. The LRTP is a broad based visionary planning document which contains a fairly predictive, yet financially constrained, assessment of the region's transportation system and the resulting list of prioritized transportation projects. Concurrent with the LRTP, the region's Congestion Management Plan document will be updated. Both of these documents, mandated by the Federal Highway Administration (FHWA), will be formulated through an extensive outreach process for input and vetting by local jurisdictions, key stakeholder organizations, and the general public. The RTF will supplement the Transit Element of the LRTP.

III. PROJECT DESCRIPTION

In order to begin implementation of transit concepts developed as part of OROP and I-26ALT, additional work is needed to prioritize transit corridors based on land uses and transit markets, determine the most effective types of transit technologies (i.e. modes of premium transit) and characteristics to serve those markets, and what the general costs and priority investments based on available funding sources should be. These steps are critical components of a Regional Transit Framework plan that defines a vision for which governments and private interests as well as the public have consensus and can prioritize investment priorities. The proposed RTF will serve as the guiding document for the region to help obtain federal funding and generate local and private investment support in a transit system that is most serviceable and valuable for future development patterns.

IV. REQUEST FOR QUALIFICATIONS

The BCDCOG is hereby issuing this Request for Qualifications (RFQ) to firms that have the capability and interest in undertaking and performing the scope of work described below. Each firm is officially a CONSULTANT. Each CONSULTANT must submit a package containing one (1) digital copy, one (1) original and six (6) copies of its proposal to BCDCOG no later than **3pm on April 12th, 2017** to:

Robin Mitchum, Finance Manager
BCDCOG
1362 McMillan Avenue, Suite 100
North Charleston, SC 29405

Proposals may be submitted in person, by messenger, or by regular mail. All proposals will be logged in and date and time stamped. Any proposal package that is received after the date and time specified will be logged in and date and time stamped as “late” and returned unopened to the CONSULTANT.

Proposals must not be more than the equivalent of 30 single-sided 8 ½ by 11-inch pages in length (not counting the front and back covers of the proposal, cover letter of interest, section dividers that contain no information or SF 330 forms). The font size should be no smaller than 12 pt. Proposals shall include the following information:

1. A work plan describing the CONSULTANT’s proposed approach and methodology to the project.
2. A suggested project schedule that includes tasks, milestones, technical memorandums, and final deliverables, to indicate how the CONSULTANT proposes to meet the targeted timeline for this project.
3. Name(s) of the prime and sub-CONSULTANTS that will comprise the team, identifying the Executive Officer of each company. Consortia, joint ventures or team proposals, although encouraged, must acknowledge that contractual responsibility will rest solely with one Contractor or legal entity which shall not be a subsidiary or affiliate with limited resources.
4. Identity of the proposed Project Manager for the team who will be the sole point of contact for BCDCOG for day to day operations.
5. List of the key personnel who will participate in performing the scope of work. Provide a resume for each listed team member, including sub-CONSULTANT key personnel who will be completing a portion of the scope of work.
6. An organizational chart depicting the relationships between the team members and agencies and responsibilities of each.
7. List of three (3) relevant projects performed within the past 5 years indicative of past performances and abilities of the proposed team, including a key client contact person for each project with current daytime phone number.
8. Standard Federal Form 330 for the prime CONSULTANT and all sub-CONSULTANTS.
9. Signature of an authorized officer of the prime CONSULTANT firm.

V. KEY STUDY DETAILS

The CONSULTANT shall prepare a RTF for the BCDCOG. Work to be performed by the CONSULTANT on the RTF includes the furnishing of all labor, equipment, materials, expertise, tools, supplies, bonds, insurance, licenses and permits, and performing all tasks necessary to accomplish work items concerning the design and development of RTF, unless specifically excluded as agreed upon by contract.

The proposal should address how the CONSULTANT will develop a RTF but is not limited to these core areas:

1. **Transit Market Analysis** – Conduct a thorough examination of current origin-destination travel pattern data and transit ridership, growth and land use plans along major mobility corridors in the region, and the relative magnitude of activity centers along such corridors. Analyze travel patterns (origin-destination trip densities) to/from each major activity center identified in OurRegion OurPlan to understand patterns and corridor priorities. The objective of this exercise will be to confirm

transit corridor investment needs and priorities from a travel demand perspective. An evaluation of potential passenger capacity needs and station priorities relative to the prioritized corridors should be included.

2. **Land Use Assessment** – Conduct an assessment of the relative walkability and development potential at key connection points or major transit stations based on field observations and through coordination with local real estate professionals to understand the market characteristics and trends, to establish priorities for transit supportive development, and discuss potential value capture strategies. Real estate and right-of-way availability will be assessed within the priority corridors and activity centers to help identify engineering constraints and areas where investments should be targeted.
3. **Develop Transit System Concept** – Establish defined screening criteria to identify mode and corridors for premium transit opportunities. Criteria will be used as a basis of determining conceptual service strategy and corridor/system and technology responsiveness. A transit system concept will be prepared, including major premium transit corridor alignments, key connection points with local and intercity transit services, and strategies for serving major activity centers. The concept will include service characteristics; service frequencies, hours of operation, and running times, for each prioritized corridor based on FTA guidance and comparisons with similar corridors in peer cities. The concept will also include appropriate vehicle technologies, facility requirements including technology for real-time rider information and other platform amenities, and station locations based on land use assessments. Engineering constraints must be considered within this process. Preliminary estimates of running times based on characteristics of each corridor as well as the preliminary service schedules to support cost estimates will be provided.
4. **Treatment of Local Bus Service** – Route-level changes to the current bus transit system should be considered where appropriate within certain corridors. Scaled factors such as increased service hours should be applied to both CARTA and Tri-County Link routes by type to simulate changes in the supporting bus network.
5. **Cost Estimates** – Premium transit capital cost estimates should be identified based on cost drivers (e.g. corridor length, number of stations, fleet size) based on previous details accumulated through this process to include unit costs of typical sections, station types, FTA standards, and a comparison against peer projects across the nation. Local transit capital cost estimates should include vehicle replacement cost based on fleet size, FTA recommended useful life, and maintenance facility replacement needs. Develop an operating and maintenance cost estimation model for existing service and CARTA/Tri-County Link and premium transit modes.
6. **Prepare Ridership Forecast** – BCDCOG travel demand model runs will be conducted for the transit concept to provide a system-wide ridership forecast, assist in the evaluation of corridor priorities and service plan refinements, and to support model validation efforts.
7. **Prepare Financial Cash Flow Model** – A pro forma cash flow model representing historical and forecasted transit revenues and expenditures will be developed.

- a. The model will incorporate an operating and maintenance cost allocation model based on local experience and National Transit Database information from peer transit systems to allow for real-time, interactive assessment of trade-offs between route-level service characteristics, capital project timing, and agency financial performance. Transit bond issues, debt service and the service concept will be incorporated into the model. Revenue and spending should be broken down by provider (CARTA/Tri-County Link).
 - b. **Funding Sources** – Forecast revenues from existing federal, state, local funding sources, and sales tax for both CARTA and Tri-County Link. Forecast revenues from existing and potential increases in sales tax revenues, vehicle registrations, gas tax, downtown parking, etc. An evaluation of the property tax base and forecasting of potential value capture revenues associated with potential new development should be identified.
 - c. **Sensitivity analysis** – Evaluate sensitivity to cost overruns, revenue shortfalls, macroeconomic changes, growth assumption changes, etc. Conduct multi-dimensional stress tests to understand changes with multiple input variables.
8. **Scenario Analysis** – Develop scenarios for interactive refinement by a steering committee in workshop format that reflect variations in economic assumptions, funding sources, corridor transit service levels and modes, implementation timing, etc.
 9. **Performance Measures** – Establish performance measures relating to financial sustainability (cash flow shortage), spending per capita (compared to other regions), transit service levels (revenue vehicle hours, revenue vehicle miles, fleet size, etc.) by mode and provider. Other areas for performance measures are population and employment areas served by transit and equitable transit service provided based on revenues, operating costs and capital investments.
 10. **Peer Review** – Conduct an analysis of peer regions identified using data categories such as population, planning agencies, regional planning agencies, transit system size, regional transit agency characteristics, and regional transit agency financials (operating and capital). Establish the need (if warranted) for the expansion of financial needs for the regional system.
 11. **System Development and Refinement** – Refinements required as a result of steering committee workshops, stakeholder meetings and public meetings will be incorporated into final development of the framework prior to completion. The ridership forecast and the financial model will be updated to reflect the refined system concept. The results of this effort will provide regional leadership with an understanding of: transit technologies and service plan for the region, priorities and order-of-magnitude costs, and a basis to begin consideration of local funding sources to support system development.
 12. **Documentation and Next Steps** – Final documentation of products developed in the process and an outline of next steps in the program implementation.

VI. CONSULTANT SELECTION PROCESS

All proposals received shall be evaluated by a CONSULTANT Selection Committee, assisted by other technical personnel as deemed appropriate for the purpose of selecting the CONSULTANT with whom a

contract will be executed. The BCDCOG reserves the right to reject any and all proposals in whole or in part if in the judgment of the CONSULTANT Selection Committee, the best interest of all parties will be served.

The CONSULTANT proposal will be evaluated using a two-step selection process. The first step will involve evaluation of a CONSULTANT's technical proposal by the CONSULTANT Selection Committee using the selection criteria below. The second (optional) step will involve oral interviews of/presentations by the CONSULTANTS submitting the highest scoring technical proposals. The selection of the CONSULTANT will be determined by the highest total score.

The criteria and weight of consideration in making the selection are:

STEP ONE: Proposal Submission

Understanding the Purpose: 20 Points

Demonstrated understanding by the CONSULTANT of the project purpose and goals as presented in the RFQ. Evaluation will be based on information presented in the CONSULTANT's proposal, and the approach and allocation of time on specific tasks. CONSULTANTS should feel free to suggest other requirements and problems that may have been overlooked.

Method of approach: 25 Points

The technical soundness of the CONSULTANT's stated approach to the project, the comprehensiveness of the proposed approach and the methodology/techniques to be used. Proposal should outline the type of deliverables anticipated over the course of the project.

Capability and qualifications: 15 Points

The qualifications, experience and technical expertise of team members, including Sub-CONSULTANTS, to be assigned to the project as specified in the proposal and with particular reference to experience and technical quality on similar projects. The CONSULTANT's professional and project staff that work on the project must be the same staff that is identified in the proposal.

Public Engagement: 10 Points

The CONSULTANT's proposed approach and experience with planning and facilitating public meetings, charrettes and experience employing innovative ways to engage the public. Proposals should outline a broad approach to public involvement for this particular project.

Cooperative work experience: 10 Points

The CONSULTANT's/CONSULTANT TEAM's experience working as a cooperative team with other CONSULTANTS and public agencies. Qualifications of professionals assigned will be measured by experience on past projects within a cooperative team environment. The CONSULTANT should provide specific examples of cooperative work experiences with contact references for the selection committee.

Originality or innovativeness: 10 Points

The degree to which an innovative approach to the project is proposed beyond the suggested elements, either in data collection and analysis, public participation, etc. that can be accomplished within the time limits.

Schedule: 5 Points

The CONSULTANT's suggested project schedule and demonstrated ability to follow a schedule that will successfully complete the project within the required time frame.

Disadvantaged Business Enterprise (DBE) designation or subcontractor participation: 5 Points

The extent to which the prospective CONSULTANT/Consulting Team includes participation of a DBE. See agency DBE policy on following page.

STEP TWO: Oral Presentations (BCDCOG reserves the right not to include this activity)

CONSULTANTS with the highest scoring technical proposals may be requested to make an oral presentation of their proposal. This presentation, if held, will provide an opportunity for the CONSULTANT to clarify details included within the submitted proposal.

QUESTIONS AND CLARIFICATIONS:

CONSULTANTS may ask questions to clarify the contents of this RFQ and expectations of the BCDCOG related to this project. All questions or request for clarifications shall be submitted by fax or email or in writing no later than **March 28th, 2017**. All questions submitted and their answers will be promptly placed on the BCDCOG website at www.bcdcog.com after the deadline for questions. No telephone inquiries shall be accepted.

If, in the judgment of the BCDCOG, changes in the content of the RFQ or the submission deadline are required, an addendum will be issued by the BCDCOG. Any addendum that may be issued will be placed on the BCDCOG website at www.bcdcog.com as well as transmitted by e-mail to a list of firms maintained by the BCDCOG and in the South Carolina Business Opportunities (SCBO).

Due to potential conflict of interest, no CONSULTANT or person representing a CONSULTANT may arrange or meet with individual members of the BCDCOG or the review committee to discuss any items or matters related to this RFQ during the period of time between the date of the release of this RFQ and the date the BCDCOG makes the decision selecting the successful CONSULTANT.

PROPOSED TIMEFRAME FOR SELECTION PROCESS

The proposed timeframe for this selection process is as follows:

Request for Qualifications Due:	April 12th by 3:00pm
Interviews (if held):	TBD
Award of Contract:	TBD
Completion of Contract:	TBD

NOTICE OF AWARD

Selection of the successful CONSULTANT will be made solely by the BCDCOG. The CONSULTANT Selection Committee shall rank each proposal against the stated criteria. BCDCOG reserves the right to contact a firm to obtain written clarification of information submitted and to contact references to obtain information regarding performance reliability and integrity.

Based on evaluations of the submitted proposals, the BCDCOG will select the top ranked firm and negotiations will begin immediately to finalize the scope of work, personnel, hours, hourly rates, use of sub-CONSULTANTS, and other direct costs that will be required to complete the agreement between BCDCOG and the selected firm. If an agreement cannot be reached with the top ranked firm, BCDCOG will first formally terminate negotiations with that firm, then identify the next most responsive and qualified firm, and then repeat the negotiation phase. This process will be continued until an agreement is reached with a qualified firm that can provide the required services. BCDCOG reserves the right to reject any and all proposals received, and in all cases BCDCOG will be the sole judge as to whether a CONSULTANT’s proposal has or has not satisfactorily met the requirements of this RFQ.

Notice of “Intent to Award Contract” will be posted on the BCDCOG website. In addition, a notice will be mailed to CONSULTANTS, informing them of the success, or lack thereof, of their proposal to receive an award.

VII. ADDITIONAL INFORMATION

FUNDING

Funding for this project will be provided through Federal, State, and local transportation/transit funding sources with the required match provided by BCDCOG. Costs incurred prior to notice-to-proceed will be the responsibility of the CONSULTANT and will not be reimbursed. All travel expenses prior to notice to proceed shall be at the CONSULTANT’s expense. This project will be negotiated as a lump sum contract.

DISADVANTAGED BUSINESS ENTERPRISE

It is the policy of the BCDCOG to ensure nondiscrimination in the award and administration of federally assisted contracts and to use Disadvantaged Business Enterprises (DBEs) in all types of contracting and procurement activities according to State and Federal laws. To that end, the BCDCOG has established a DBE program in accordance with regulations of the United States Department of Transportation found in 49 CFR Part 26. Each CONSULTANT is encouraged to use certified DBEs to meet the tasks and milestones

of this request. A list of certified DBEs can be found at: http://www.scdot.org/doing/businessDevelop_SCUnified.aspx.

To ensure compliance with the BCDCOG DBE policies, BCDCOG’s goal is to achieve a minimum participation of 10% by South Carolina Unified Certification Program (UCP) certified DBEs for this project. The following statement should be included in the proposal to denote the level of proposed DBE participation.

“We the (CONSULTANT) ensure to the fullest extent possible that at least _____% of all procurement, including sub CONSULTANTS, made with funds provided under this project/plan/request will be made from organizations owned and controlled by socially and economically disadvantaged individuals, women, and historically black colleges and universities.”

PROPRIETARY/CONFIDENTIAL INFORMATION

Trade secrets or proprietary information submitted by a CONSULTANT in connection with a procurement transaction shall not be subject to public disclosure under the Freedom of Information Act; however, the CONSULTANT must invoke the protections of this section prior to or upon submission of the data or other materials, and must identify the data or other materials to be protected and state reasons why protection is necessary. Disposition of such material after award is made should be requested by the CONSULTANT. No information, materials or other documents relating to this procurement will be presented or made otherwise available to any other person, agency, or organization until after award.

All CONSULTANTS must visibly mark as "Confidential" each part of their proposal that they consider to contain proprietary information. All unmarked pages will be subject to release in accordance with the guidelines set forth under Chapter 4 of Title 30 (The Freedom of Information Act) South Carolina Code of Laws and Section 11-35-410 of the South Carolina Consolidated Procurement Code. Privileged and confidential information is defined as "information in specific detail not customarily released to the general public, the release of which might cause harm to the competitive position of the part supplying the information." The examples of such information provided in the statute includes: customer lists, design recommendations and identification of prospective problem areas under an RFQ, design concepts to include methods and procedures, and biographical data on key employees of the CONSULTANT.

Evaluative documents pre-decisional in nature such as inter or intra-agency memoranda containing technical evaluations and recommendations are exempted so long as the contract award does not expressly adopt or incorporate the inter- or intra-agency memoranda reflecting the pre-decisional deliberations.

Marking the entire proposal confidential/proprietary is not in conformance with the South Carolina Freedom of Information Act.

VIII. PROJECT SCHEDULE

The CONSULTANT must agree to begin work upon issuance of a notice to proceed by BCDCOG and to complete this work within *eight (8) months* of the date of such notice (negotiable). The work shall be guided by a detailed flow diagram, prepared by the CONSULTANT and furnished to the BCDCOG within one week of receipt of notice to proceed, and approved by BCDCOG. The project shall be considered complete only after action has been taken by the BCDCOG Board of Directors. Periodic payments for the

work shall be made in accordance with a schedule proposed by the CONSULTANT and approved by BCDCOG.

IX. MEETINGS

Public meetings shall be conducted by the CONSULTANT in coordination with BCDCOG staff during the course of this project. The CONSULTANT shall be responsible for the logistics of these meetings and consistency with the CHATS Public Participation Plan. The number of meetings to be held shall be negotiated between the CONSULTANT and BCDCOG/MPO project manager as part of the scope of work.

X. BRIEFINGS AND PRESENTATIONS

Regularly scheduled briefings shall be held by the CONSULTANT for the BCDCOG/MPO. These briefings shall be held at least once every month at an agreed upon location during the course of the project. The purpose of the briefings will be to appraise the BCDCOG/MPO project manager of the activities of the CONSULTANT, to schedule future activities and to ensure that the PROJECT is on schedule. Minutes for these meetings shall be the responsibility of the CONSULTANT. Technical project presentations shall be made to the BCDCOG/MPO as requested by the BCDCOG/MPOs project manager and/or Executive Director until adoption, and possibly following the completion, of the plan.

XI. COMPUTING REQUIREMENTS

The BCDCOG will not be responsible for providing any proprietary software packages to the CONSULTANT. Should the CONSULTANT desire to use any BCDCOG programs, permission must be received in accordance with this agreement. Computations or graphics based on computer programs other than the BCDCOG's, must conform to all BCDCOG format requirements.

XII. SPECIFICATIONS FOR DOCUMENTATION

All documentation shall be in Microsoft Word and/or Adobe Portable Document Format (PDF). Any programming source codes, form designs, raw source database (in dBase III format, with field coding definition sheet) and other ancillary files shall be transferred to the MPO in addition to the executable applications at the closure of each task or any moment specified by the MPO project manager.

XI. DELIVERABLES

The CONSULTANT shall provide copies of all Technical Memoranda (including any spreadsheets or models used), Draft Documents, an Executive Summary of the Final Report in an agreed upon format, and the Final Report in electronic and published formats. The number of paper copies shall be determined between the CONSULTANT and the BCDCOG Project Manager. All work documents shall be presented to BCDCOG upon completion (InDesign files, etc.) of the project or established milestone. For presentations to the Committees and Board of the BCDCOG, the CONSULTANT shall prepare a PowerPoint or similar format presentation.

Appendix - Study Area Map

