



Request for Proposals

PROJECT 20T07

BEST PRACTICES FOR LOCAL CAPITAL IMPROVEMENT PROGRAM (CIP) DEVELOPMENT & PROMOTING HEALTHY COMMUNITIES

ISSUE DATE

November 9, 2020

DUE DATE

December 4, 2020 (2:00 PM)

Submit Qualifications (by email only) to:

Bala Akundi: bakundi@baltometro.org

Contact for More Information: Bala Akundi

E-mail: bakundi@baltometro.org

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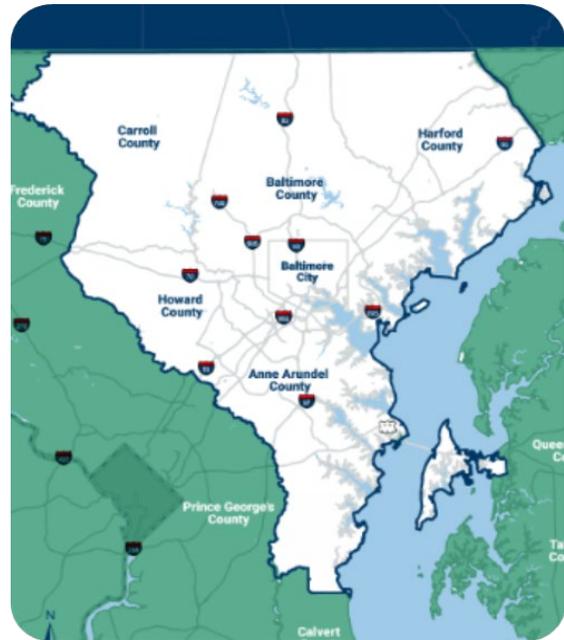
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Introduction

BMC is a private nonprofit organization committed to identifying regional interests and developing collaborative strategies through plans and programs, which will improve the quality of life and economic vitality throughout the region. BMC’s Board of Directors includes the Mayor of Baltimore City, Executives of Anne Arundel, Baltimore, Harford and Howard counties, a Carroll County Commissioner, a Queen Anne’s County Commissioner, a Delegate and Senator from the State of Maryland, and a gubernatorial appointee.

The Baltimore Regional Transportation Board (BRTB) is the designated Metropolitan Planning Organization (MPO) for the Baltimore region. The members consist of designated representatives from Baltimore City, Anne Arundel County, Baltimore County, Carroll County, Harford County, and Howard County, Queen Anne’s County, the City of Annapolis, plus the Maryland Department of Transportation, the Maryland Department of the Environment, the Maryland Department of Planning, the MDOT Maryland Transit Administration, and Harford Transit. The Baltimore Metropolitan Council (BMC) staff provides technical support to the BRTB.



The work of BMC staff includes transportation forecasting and analysis, economic and demographic research, computer mapping applications, air and water quality programs, multimodal planning, cooperative purchasing, workforce development, housing and rideshare coordination.

Purpose

The Baltimore Metropolitan Council (BMC) is soliciting proposals from qualified firm(s) or organization(s) to provide professional services to examine current and best practices in two very distinct areas:

- 1. Capital Improvement Program (CIP) Development**
- 2. Promoting Healthy Communities**

1. Capital Improvement Program (CIP) Development

A Capital Improvement Program (CIP) contains all of the individual capital projects, equipment purchases, and major studies for a local government; in conjunction with construction and completion schedules, and in consort with financing plans. A CIP provides a “working blueprint” for sustaining and improving a community’s infrastructure. A CIP coordinates strategic planning, financial capacity, and physical development. Typically the CIP stands at the epicenter of a government’s Planning, Public Works, and Finance departments.

For purposes of this task, the focus will be on best practices associated with the transportation component(s) of a CIP, in particular how transportation projects are programmed in a CIP, and the value of the transportation agencies and stakeholder input and involvement in the CIP development process. Currently each member jurisdiction has its own process for developing the CIP. These processes may or may not be codified or even well documented across the region. This task will assess key steps in the current processes for member jurisdictions in the region and then examine other regions for relevant and feasible Best Practices. Topics for consideration include:

- Legal Basis;
- Schedule;
- Budget issues / fiscal constraint;
- Agency Input;
- Citizen Input;
- Equity;
- Evaluation Criteria; and
- Review and Approval.

2. Promoting Healthy Communities

For many years the transportation community has been focused on commuters, those trips taken to get people from home to work and then back home. Over time, other trips have been included to some degree. Now the focus is on all trips, as well as encouraging active transportation to support the overall health of our communities. As this is taken into consideration, we are looking to various models as to how we can all do a better job of providing the opportunity for more people to be active.

The purpose of this task is to identify best practices to planning healthy communities or areas where improvements can be made to the built environment to allow for active lifestyles, promote connections to jobs and services, and encourage walking and biking on a regular basis.

This task will identify areas of local government and regional planning where a new perspective on development can lead to better health outcomes for all members of society.

The impetus for this task comes from many directions. Three specific examples from the national level include: 1) the AARP program called Livable Communities 2) the Centers for Disease Control and Prevention (CDC) called Active People, Healthy Nation and 3) 2020 County Health Rankings Report published by the Robert Wood Johnson

Foundation. On the local level the Harford County program called Harford NEXT is an example of this type of activity.

Healthy communities are built upon active residents of all ages. This task will identify unique initiatives and strategies that support strong and vibrant communities that foster the health of its residents and could lead to changes in the built environment. Communities across the country are recognizing the link between the built environment and physical and mental health and wellness. Land use decisions, community design, and transportation planning have a direct effect on many poor health outcomes. Therefore, health and wellness must be incorporated into the planning process. The transportation community can certainly reassess the potential impact of communities as new approaches such as MDOT SHA's new guidance: Context Driven, Access & Mobility for all Users as well as new policy/ordinances for Complete Streets at the state and local level.

This Request for Proposals (RFP) seeks to identify potential providers for this work. The Baltimore Regional Transportation Board (BRTB) has approved these two work items as part of the Addendum to the FY 2020-2021 Unified Planning Work Program (UPWP). While seemingly different tasks, they both involve a review of local practices across a range of agencies as well as recommendations for best practices.

Scope of Work

The proposed Scope of Services shall include sufficient detail to determine how each task shall be accomplished; it shall include, but not be limited to, descriptions of the anticipated deliverables and a project timeline in Gantt chart format. It will describe how the consultant proposes to complete the project, including the allocation of resources to accomplish each task. The Scope of Services must be sufficiently detailed for the BMC to determine the effectiveness of the proposal and should spell out how this work can be performed in a cost-efficient and timely manner.

The proposed Scope of Work shall address the following components:

Task 1. Interview local jurisdictional staff:

This effort is built on an understanding of:

1. The capital improvement program development (CIP) processes and policies at each local jurisdiction.
2. Promoting healthy communities

The Selected Bidder will interview and document current practices and policies and identify any unique best practices occurring within the region. The selected bidder will develop interview questions in consultation with a steering committee established for each task. Local jurisdiction staff interviewed for the two tasks may come from different departments such as transportation, public works, planning, health, etc. The steering committee will help the selected bidder identify the appropriate staff to be interviewed.

Task 1 Deliverables:

- A document by the Selected Bidder of -
 - Staff interviews from the region’s local jurisdictions of CIP development process, practices and policies;
 - Staff interviews from the region’s local jurisdictions promoting healthy communities;
 - How these practices and policies incorporate input from transportation agencies in the region and the level of autonomy transportation agencies have in developing input into the CIP and in promoting healthy communities;
- Prepare presentation materials (presentations, graphics, handouts, illustrations, and maps, etc.) that help explain the task results;
- Meeting with steering committee(s), and Technical Committee to review the task 1 report.

Task 2: Research and document best practices, processes and techniques

For each task, a scan and literature review of best practices within the region and nationally should be undertaken. Identify best development review processes, practices and techniques from peer jurisdictions, peer regions and local governments nationally.

Task 2 Deliverables:

- A report documenting the literature scan, and findings as a series or set of potential best practices, processes and techniques and improvements to current local development review practices by the Selected Bidder must be created as part of this task;

- Prepare presentation materials (presentations, graphics, handouts, illustrations, and maps, etc.);
- Meeting with steering committee to review work undertaken in this task.

Task 3: Final Report

- The Selected Bidder will compile work done in Task 1 & 2 into a final report of best practices in Capital Improvement Programming by transportation agencies and promoting healthy communities and develop a set of recommendations for the region's local governments to implement these best practices.

Task 3 Deliverables:

- Final report documenting findings of research and interviews;
- Develop recommendations on the possible implementation of best practices;
- Prepare presentation materials (presentations, graphics, handouts, illustrations, and maps, etc.)
- Meeting with steering committee(s), and Technical Committee to review the final report.

Task 4: Meeting Facilitation

Through this process, the Selected Bidder shall be responsible for participating in and facilitating the project steering committee meetings made up of staff from member jurisdictions and the Baltimore Metropolitan Council. The Selected Bidder shall be prepared to provide the steering committee and the Technical Committee with presentations on the purpose of the project, the proposed project approach and other information for detailing accomplishments and milestones reached, soliciting input and

identifying next steps, upon request. The Selected Bidder shall also make presentations on draft deliverables, research, data, and other relevant information. The Selected Bidder will be responsible for meeting facilitation, preparing meeting materials, and other tasks as discussed with the project work group. All meeting materials shall be submitted to the BMC Project Manager at least one week prior to the meeting date in order to provide sufficient time for feedback.

Task 4 Deliverables:

- Facilitate project steering committee meetings (including work groups, BRTB and Technical Committee as needed) and prepare meeting materials and minutes;
- Prepare presentation materials (presentations, graphics, handouts, illustrations, and maps, etc.) that help explain the task results;

Consultant Qualifications

BMC is seeking a firm, or team, with requisite technical capability and professional expertise to provide the type of services required and outlined in this Scope of Work. A qualified offeror’s firm or team should have knowledge of the Baltimore region and the local and state agencies involved in the study as well as experience working on CIP development and promoting healthy community options in other municipalities.

Proposal Content and Requirements

The proposal shall consist of two separate parts: (1) a Technical Proposal; and, (2) a Cost Proposal. Each offeror shall provide their technical proposal and cost proposal in a separate .pdf file. Proposals shall meet, at a minimum, the following requirements.

Technical Proposal

The Technical Qualifications shall contain the following:

- *Cover Letter* – signed by an executive with authority to commit the offeror and stating the period for which the proposal is valid. (1 page maximum)
- *Work Program* – Offerors shall provide a discussion of each task to be undertaken, how it will be performed, and the products to be provided. An overall schedule of work should be developed. Offerors may include but are not limited to the identified tasks. Offerors are encouraged to suggest modifications that would facilitate a successful work program. (12 page maximum)
- *Experience and Qualification* – The offeror shall list its qualifications with regard to the selection criteria identified in this RFP. The summary should contain: (a) the information on projects of similar nature that offeror has completed, including brief descriptions, dates, and names of contact persons. In project descriptions, identify the roles of the identified project manager and key personnel. Please include links to relevant work if possible, and (b) the resumes of proposed project manager and key team personnel. (8 pages maximum)
- *Project Management* – Designation of a project manager and the responsibilities of the manager and key personnel. Provide a summary of qualifications of the

project manager and key staff for each firm. Note that the resulting contract will require commitment of the specified personnel. (5 pages maximum)

- *DBE Participation* – The program for assuring the maximum opportunity for participation by Disadvantaged Business Enterprises (DBEs) in accord with BMC’s goals shall be presented. See the section of MANDATORY STATEMENTS for statement of DBE participation goals.
- *Other Information* – Any other material that the offeror wishes to provide. Please limit to relevant information. (4 pages maximum)

The body/narrative of all documents will be formatted to a 12-point font size. Headers and cover pages may utilize larger font sizes. Cover pages will not be counted toward the page limits. Digital signatures are acceptable for all documents.

Cost Proposal

The Cost Proposal shall be composed of two parts: (1) Project Budget and (2) Affidavits and Certifications.

- *Project Budget* – Proposers shall provide a price quote as a fixed price in United States dollars. The price quote shall include the number of labor hours and cost by staff member and total hours and cost estimated for each task. Direct costs shall be itemized by category (e.g., travel, per diem, printing and reproduction, /etc.) for the entire project. The contract type is anticipated as fixed price with partial payments paid based on task completion.
- *Affidavits and Certifications* – An original signed copy of the Proposal Affidavit attached at the end of this RFP shall be included in the Cost Proposal.

BMC reserves the right to reject proposals that do not meet the Technical and Cost Proposal requirements.

Submission Of Proposals

All offerors shall submit by email two (2) separate digital pdf files – one (1) for each of the Technical and Cost Proposals to: bakundi@baltometro.org.

The proposal must be received by BMC no later than 2:00 PM Eastern Standard Time on December 4, 2020. Proposals arriving after the deadline will not be accepted. Note that BMC's email will accept files up to 25MB. If your proposal documents exceed 25MB, please upload the documents to a file sharing service like Google Drive or Dropbox and email the link to the files.

Please direct any questions to Bala Akundi at bakundi@baltometro.org no later than November 16, 2020. All questions will be collected and answers will be posted to BMC's website by November 20, 2020. Questions arriving after November 16 will not be answered.

BMC will not pay for the development and submission of proposals in response to this RFP. BMC reserves the right to reject any proposals without cost or detriment to BMC.

The offeror shall not make changes in the specifics put forth in a proposal, including staff participation, without the prior written consent of BMC.

The BMC Staff member listed above shall be the sole point of contact for any offeror during the procurement process.

BMC reserves the right to waive minor irregularities, to negotiate in any manner necessary to best serve the public interest, and to make a whole award, multiple awards, a partial award, or no award. BMC reserves the right to cancel this RFP, in whole or in part, any time before the closing date.

Tentative Schedule

RFP Issued	November 9, 2020
Proposal Question Due	November 16, 2020
Answer to Questions Posted	November 20, 2020
Proposals Due	Friday, December 4, 2020, 2:00 p.m.
Consultant Selection	January, 2021
Start of Work	January, 2021
Completion of Work	September 30, 2021

Consultant Selection Criteria

All proposals will be evaluated on the basis of technical merit (including areas required within the Technical proposal such as work program, team and personal experience, project management, adherence to RFP and DBE integration) and proposed cost. This is not a low-bid procurement. The FY 2021 UPWP budgeted \$125,000 for the consultant part of this task but proposals will be considered outside of this range if the proposed work program will provide a greatly superior product. BMC staff and/or appropriate project partners will conduct the evaluation of proposals. Technical merit includes work program and approach, as well as staff experience and qualifications. Teaming is permissible but the offeror will be with a single prime contractor.

BMC reserves the right to negotiate with one or more offerors selected on the basis of the initial technical merit and proposed cost. Offerors may be asked to make personal appearances to provide additional information on proposals.

“Sample” Form Contract

BMC's form contract is available on BMC's website and is incorporated into this solicitation.

https://www.baltometro.org/sites/default/files/bmc_documents/RFP/sample-rfp-contract_fy2019.pdf

By the act of submitting a proposal, the offeror expressly acknowledges that he/she/it accepts the terms and conditions as stated in the form contract unless exceptions are submitted in writing with the proposal. BMC reserves the right to amend the terms of the form contract as it sees fit during contract negotiation.

The offeror's acceptance of, or deviations from, the form contract terms and conditions are considered during the evaluation and subsequent award

If the offeror submits an exception that alters BMC's risk, liability, exposure in, or the intent of this procurement, BMC reserves the right in its sole and absolute discretion to deem the offeror non-responsive.

Confidentiality

Offerors must specifically identify any portions of their proposals deemed to contain confidential information, proprietary information or trade secrets. Those portions must be readily separable from the balance of the proposal. Such designations will not be conclusive, and offerors may be required to justify why such material should not, upon written request, be disclosed by BMC under the Public Information Act, State Government Article, Title 10, Sub-Title 6, of the Annotated Code of Maryland, as amended. BMC may disclose such information if required by law, court order or subpoena.

Maryland Registration/Qualification Requirements

BMC requires vendors to register or qualify to do business with Maryland Department of Assessments and Taxation (SDAT) in accordance with the Annotated Code of Maryland, Corporations and Associations Article: §2-102 Formation generally, §7-202 Registration to do interstate and foreign* business, and/or §7-203 Qualification to do intrastate business.

For information on registering or qualifying a corporation, LLC, LLP or LP, call SDAT at 410-767-1340. Sole Proprietors and General Partnerships should call 410-767-4991 or you may download the SDAT forms at <http://www.dat.state.md.us/Pages/sdatforms.aspx>

The successful offeror may be required to submit a Good Standing Certificate (also known as "Certificate of Status") issued by SDAT within 10 days of being notified of potential award.

(*Note: "a corporation, association, or joint-stock company organized under the laws of the United States, another state of the United States, a territory, possession, or district of the United States, or a foreign country," Md. Code Ann., Corporations & Associations, §1-101.)

Mandatory Statements

Public Information Act Notice

Offerors should give specific attention to the identification of those portions of their proposals they deem to be confidential, proprietary information or trade secrets and provide any justification why such materials, upon request, should not be disclosed.

Disadvantaged Business Enterprise Notice

Disadvantaged business enterprises (DBEs) are encouraged to respond to this solicitation. It is the intent of BMC that certified minority business enterprises and sub-contractors be given the opportunity to submit proposals to this RFP and will not be subject to discrimination on the basis of race, color, sex, or national origin in consideration for an award.

All selected contractors will be required to abide by the DBE Program of the Baltimore Regional Transportation Board (BRTB). The DBE Program may be found on BMC's website.

Disadvantaged Business Enterprise Subcontract Participation Goal

The Baltimore Metropolitan Council hereby notifies all offerors that in regard to any contracts entered into pursuant to this advertisement, MBEs and WBEs will be afforded full opportunity to submit expressions of interest in response to this notice and will not be subject to discrimination on the basis of race, color, sex or national origin, in consideration for an award.

It is the goal of BMC that certified businesses participate in all competitively bid federal-aid contracts. A DBE subcontract participation goal of 31.7 percent of the total contract amount has been established for this procurement. Prime contractors holding a DBE

certification will be awarded full (100 percent) credit for the DBE goal. Offerors must make a good faith effort to meet this goal in order to receive appropriate consideration. The offeror can demonstrate that it has made a good faith effort by meeting the goal or by documenting good faith efforts to do so in its proposal. Determination of good faith efforts will be made at the discretion of appropriate BMC staff. All offers submitted in response to this RFP must include a statement specifying the Maryland Department of Transportation (MDOT) has certified the DBE or DBEs utilized to meet this requirement. If the DBE has not been certified by MDOT but has been certified by other state transportation agencies receiving federal funding, the name of the agency should be included in the proposal. BMC reserves the option to accept this certification in lieu of MDOT certification.

PROPOSAL AFFIDAVIT

A. (ANTI-BRIBERY AFFIRMATION). I HEREBY CERTIFY THAT

(1) I am the (title) _____ and the duly authorized representative of (offeror) _____ and that I possess the legal authority to make this Affidavit on behalf of myself and the offeror for which I am acting.

(2) Except as described in paragraph 3 below, neither I, nor to the best of my knowledge, information, and belief, the above offeror, nor any of its officers, directors, or partners, nor any of its employees directly involved in obtaining contracts with the State or any county, bi-county, multicounty agency or subdivision of the State has been convicted of, or has pleaded nolo contendere to a charge of, or has during the course of an official investigation or other proceeding, admitted in writing or under oath acts or omissions committed after July 1, 1977, which constitute bribery, attempted bribery, or conspiracy to bribe under the provisions of Article 27 of the Annotated Code of Maryland or under the laws of any state or federal government.

(3) State "none" or, as appropriate, list any conviction, plea or admission described in paragraph 2 above, with the date; court official, or administrative body; and the sentence or disposition, if any: _____.

(4) **I ACKNOWLEDGE THAT** this Affidavit is to be furnished to the Procurement Officer, and may be furnished to the Attorney General pursuant to Sections 16-201, et seq., of the State Finance and Procurement Article of the Annotated Code of Maryland. I acknowledge that if the representations set forth in this Affidavit are not true and correct, the Council may terminate any contract awarded and take any other appropriate action.

B. (NON-COLLUSION AFFIRMATION). I HEREBY FURTHER AFFIRM THAT neither I nor, to the best of my knowledge, information and belief, the above firm nor any of its other representatives I here represent have:

(1) Agreed, conspired, connived or colluded to produce a deceptive show of competition in the compilation of the bid or offer being submitted herewith;

(2) In any manner, directly, or indirectly, entered into any agreement, participated in any collusion to fix the bid price or price proposal of the offeror herein or any competitor, or

otherwise taken any action in restraint of free competitive bidding in connection with the contract for which the within bid or offer is submitted.

C. (PROCUREMENT AFFIRMATION). I HEREBY FURTHER AFFIRM THAT

(1) Neither the above business nor, to the best of my knowledge, information, and belief, any officer, controlling stockholders, partner, principal, or other person substantially involved in the contracting activities of the business has in the past five (5) years: (a) been convicted under state or federal statute of a criminal offense incident to obtaining or attempting to obtain or performing a public or private contract, fraud, embezzlement, theft, forgery, falsification or destruction of records, or receiving stolen property; (b) been found civilly liable under state or federal antitrust statutes for acts or omissions in connection with the submission of bids or proposals for a public or private contract; (c) been convicted of any violation of a state or federal antitrust statute; (d) been convicted under the provisions of Title 18 of the United States Code for violation of the Racketeer Influenced and Corrupt Organizations Act, 18 USC Section 1961 et seq.; or (e) the Mail Fraud Act, 18 USC Section 1341 et seq., for acts arising out of the submissions that would constitute grounds for conviction or liability under any statute described above. Also, the undersigned offeror was not founded or established or is not operated in a manner designed to evade the application or defeat the purpose of the Debarment Regulations, COMAR 21.08; is not currently suspended or debarred pursuant to COMAR 21.08 or by the action of any other public entity; and is not a successor, assignee, subsidiary, or affiliate of a suspended or debarred business.

(2) (a) If the affirmation described in subsection (1) cannot be given and debarment proceedings have not been instituted against the business pursuant to COMAR 21.08, indicate the reasons why the affirmation cannot be given, including any conviction or admission described in subsection (1), above, with the date, court and sentence or disposition, if any; the name(s) of the person(s) involved, and their current positions and responsibilities with the business; the activity specified in COMAR 21.08 in which each person was involved; and the details of the person's participation in the activity, including the name(s) of an entity involved and the person's positions and responsibilities with the entity. (Attach additional sheets as necessary.)

(b) If the affirmation described in subsection (1) cannot be given, and debarment proceedings have been instituted against the business pursuant to COMAR 21.08, indicate the status of such proceedings.

I ACKNOWLEDGE THAT this Affidavit is to be furnished to the Procurement Officer and may be distributed to units of: (1) the State of Maryland; (2) counties or other subdivisions of the State of Maryland; (3) other states; and (4) the federal government. I further acknowledge that this Affidavit is subject to applicable laws of the United States and the State of Maryland, both criminal and civil, and that nothing in this Affidavit or any contract resulting from the submission of this bid or proposal shall be construed to supersede, amend, modify or waive, on behalf of the State of Maryland or any unit of the State of Maryland having jurisdiction, the exercise of any statutory right or remedy conferred by the Constitution and the laws of Maryland in respect to any misrepresentation made or any violation of the obligations, terms and covenants undertaken by the above firm in respect to (1) this Affidavit, (2) the contract, and (3) other Affidavits comprising part of the contract.

I DO SOLEMNLY DECLARE AND AFFIRM UNDER THE PENALTIES OF PERJURY THAT THE CONTENTS OF THIS AFFIDAVIT ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INFORMATION, AND BELIEF.

(Date)

(Affidavit)

