



ALAMEDA COUNTY TRANSPORTATION COMMISSION

On-Call Planning and Policy Professional Services

Pre-Submittal Meeting

RFQ No. 23-0005 for On-Call Planning and Policy

November 15, 2022

Agenda

1. Introduction
2. Alameda CTC Overview
3. Scope of Work
4. RFQ Schedule
5. Local Business Contract Equity Program
6. SOQ Requirements
7. Evaluation/Criteria
8. Award
9. Sole Point of Contact
10. Questions Submittal
11. Questions and Answers

Alameda CTC Overview

- The mission of the Alameda County Transportation Commission is to plan, fund and deliver transportation programs and projects that expand access and improve mobility to foster a vibrant and livable Alameda County.
- Alameda CTC coordinates countywide transportation planning efforts; programs local, regional, state and federal funding; and delivers projects and programs including those approved by voters in Alameda County transportation expenditure plans for Measure B, Measure BB and the Vehicle Registration Fee.

Alameda CTC Overview

- Agency is governed by a 22-member Commission:
 - Five Alameda County Supervisors
 - Two Oakland City Council representatives
 - One representative from each of the other 13 city councils
 - One representative each from AC Transit and BART

On-Call Planning & Policy Services

Contract Purpose

- Support planning efforts, policy development, and technical analyses
- Support Alameda CTC in advancing equity, safety and sustainability
- Support delivery of Alameda CTC programs

On-Call Services Contract

- One consultant team
- All services authorized by Task Order as needs arise
- 3-year contract, option to continue 2 additional years (up to a total of 5 years)

Scope of Services Overview

ANTICIPATED WORK AREAS:

1. Contract Administration & Management
2. Transportation Policy & Strategy Implementation
3. Outreach Support Services
4. Countywide Transportation Plan (CTP) & Major Planning Initiatives
5. Multimodal Corridor Studies, Plans & Project Analyses
6. Technical Analyses & Modeling Support
7. Program Management Support

Scope of Services Highlights

- Help advance strategies in the 2020 CTP and Plan Bay Area 2050 (PBA 2050)
- Provide technical assistance for the following:
 - Countywide High-Injury Network (HIN) and Safe Systems Planning
 - Countywide Bicycle Network Implementation
 - Vehicle Miles Traveled (VMT) Tool and GHG Assessments
 - Zero emission and clean fueling assessments for freight and passenger vehicles
- Provide resources for inclusive and equitable engagement
- Support next major update of the Countywide Transportation Plan
- Travel modeling, mapping, and grant writing
- Program management support

Minimum Qualifications

1. Consultant Team:

- Evidence of at least 1 project within past 5 years for each area of work described in the Preliminary Scope of Services

2. Project Manager:

- Professional planner, economist, analyst or engineer as evidenced by education, work experience, and/or license
- At least 5 years of project & contract management experience

Per the RFQ, this information must be included in your Letter of Transmittal.

Desired Qualifications

1. Consultant Team:

- Evidence of at least 2 projects within past 5 years for each area of work described in the Preliminary Scope of Services
- Experience working with Alameda CTC partner agencies
- Experience providing strategic guidance to public sector clients

2. Project Manager:

- Experience managing large subconsultant teams
- Experience contracting with Alameda CTC

SOQ Format: Project Experience Summary

Include a summary table identifying which projects apply to the work areas of [Appendix A](#). Please use the following format:

No.	Project Name	Contract Administration & Management	Transportation Policy and Strategy Implementation	Outreach Support	CTP and Major Planning Initiatives	Multimodal Corridor Studies, Plans, and Project Analyses	Technical Analyses & Modeling Support	Program Management Support
1	Example Project A	X	X		X			
2	Example Project B	X		X			X	
3	Example Project C	X						X
4	Etc.							X

RFQ Schedule (RFQ Table 1)

LATE SUBMITTALS WILL NOT BE ACCEPTED. SUBMISSIONS BY EMAIL ACCEPTED ONLY. SCHEDULE IS IN PACIFIC TIME.

ACTIVITY	DATE/TIME
RFQ issued.	November 3, 2022
Optional Online Pre-Submittal Meeting	November 15, 2022 1:00 p.m.
Deadline for proposers to submit questions. All questions must be directed by email to the Sole Point of Contact.	November 17, 2022 3:00 p.m.
Final Addendum issued, if necessary.	December 1, 2022
Due Date for Submittal and References Forms. References shall submit the web-based Reference Questionnaire (identified in the cover letter of the RFQ) by or before this deadline.	December 8, 2022 3:00 p.m.
Anticipated SOQ Review.	January 17, 2023
Interviews, if necessary.	January 30, 2023
Anticipated Final Evaluation and Determination of Top-Ranked Firm.	January 31, 2023
Contract Award Request to the Alameda CTC Commission	April 11, 2023
Anticipated Contract Commencement.	May 5, 2023

Local Business Contract Equity Program

This contract will be funded in whole or in part by Alameda CTC VRF, Measure B and/or Measure BB funds, or such funds in combination with other local funds. As such, Alameda CTC's Local Business Contract Equity Program will apply. **The Program's goals for professional services are 70.0% for LBE and 30.0% for SLBE.** Further detail regarding this Program can be found on the Alameda CTC website at www.alamedactc.org/contract-equity.

CERTIFICATION TEAM

Phone: (510) 208-7460

Fax: (510) 893-6489

Email: certification@alamedactc.org

SOQ Requirements (RFQ Table 3)

Proposers must provide completed Forms and Certifications (see RFQ Table 3) for prime consultant and all subconsultants. **If there is any reason that specific items are incomplete or not provided, proposers must include a justification for each item explaining why it was incomplete or not provided.**

SOQ Format

- SOQ Cover
- Letter of Transmittal
- Title Page
- Table of Contents
- SOQ Content
 - Resources Form
 - Cost Proposal
 - Project Experience Summary
- Performance Measures
- References
- Required Forms and Certifications
- Resumes

SOQ Requirements (Costs and Financial Documentation)

Required cost and financial documents within ten (10) business days of notice to the successful proposer:

- W-9 Form (<https://www.irs.gov/forms-pubs/about-form-w-9>).
- Independent Auditors' Report (for indirect cost rate audits), or if unavailable, an indirect cost rate schedule may be acceptable.
- Certified payroll registers.
- Certification of Indirect Costs and Financial Management System Form for the indirect cost rate for the most recent Fiscal Period (one-year accounting period); i.e., 01/01/2021-12/31/2021 or 07/01/2021-06/30/2022, whichever is later. The date range format of MM/DD/YYYY-MM/DD/YYYY must be provided in the Fiscal Period field, per the definition of fiscal period on the form.

The ICR proposed in Cost Proposal Form B is the rate cap used in the final contract for the prime and all subs.

SOQ Requirements (Audit Report or ICR Schedule)

STATEMENT OF DIRECT LABOR, FRINGE BENEFITS, AND GENERAL OVERHEAD FOR THE YEAR ENDED DECEMBER 31, 2018

Description	Financial Stmt Expenses	Disallowed Costs	Total Proposed	% of Direct Labor
Direct Labor	\$ 274,950,701	\$ -	\$ 274,950,701	-
Fringe Benefits:				
Payroll Taxes	22,118,267	-	22,118,267	8.04%
Group Insurance & Workers' Compensation	19,378,156	-	19,378,156	7.05%
Fringe Salaries	34,828,467	-	34,828,467	12.67%
Additional Compensation	10,297,573	-	10,297,573	3.75%
Other Employee Benefits	12,640,717	(697,719) (a)	11,942,998	4.34%
Total Fringe Benefits	99,263,180	(697,719)	98,565,461	35.85%
General Overhead Expenses				
Office Rent	30,414,766	-	30,414,766	11.06%
Depreciation	10,989,548	-	10,989,548	4.00%
Amortization	7,156,538	(599,817) (b)	6,556,721	2.38%
Repairs And Maintenance	8,155,238	-	8,155,238	2.97%
Indirect Salaries	106,584,743	(1,960,594) (c)	104,624,149	38.05%
Fringe Benefits (Administrative)	33,753,131	(1,373,734) (a)	32,379,397	11.78%
Computer, Supplies, Reproduction	15,915,364	(1,334) (d)	15,914,030	5.79%
Travel And Related Expenses	9,020,497	(1,214,327) (e)	7,806,170	2.84%
Relocation And Moving (Office)	204,057	-	204,057	0.07%
Communications	2,804,667	-	2,804,667	1.02%
Subscriptions, Books, Fees	1,429,656	(270,384) (f)	1,159,272	0.42%
Consultant Fees	6,180,924	(2,722,432) (g)	3,458,492	1.26%
Additional Compensation	5,610,968	(19,464) (h)	5,591,504	2.03%
Miscellaneous Expenses	9,720,791	(2,988,128) (g)	6,732,663	2.45%
General Insurance	2,557,616	-	2,557,616	0.93%
Insurance E&O	2,954,168	-	2,954,168	1.07%
Other Taxes	1,999,544	(14,369) (i)	1,985,175	0.72%
State & Local Income Taxes	6,910,195	455,085 (j)	7,365,280	2.68%
Audit & Legal	2,490,269	(335,779) (k)	2,154,490	0.78%
Bid and Proposals/Research and Development	20,460,847	(347,021) (l)	20,113,826	7.32%
Interest Expense	1,273,007	(1,273,007)	-	0.00%
Bad Debts	4,928,513	(4,928,513)	-	0.00%
Professional Listings	579	(579)	-	0.00%
Federal Tax Expense	14,300,906	(14,300,906)	-	0.00%
Total General Overhead	305,816,532	(31,895,303)	273,921,229	99.62%
Total Fringe Benefits and General Overhead	405,079,712	(32,593,022)	372,486,690	135.47%
Facilities Capital Cost Of Money(FCCM)	1,626,551	-	1,626,551	0.59%
Total Allowable and Non Allowable Overhead	\$ 406,706,263	\$ (32,593,022)	\$ 374,113,241	136.06%
Percentage of Direct Labor	147.92%	-11.86%	136.06%	

FAR References and Notes

- (a) 31.205-13; 31.205-14: Unallowable gifts, entertainment and recreation.
- (b) 31.201-4; 31.205-11: Unallowable costs related to backlog.
- (c) 31.205-6; 31.205-22; 31.205-27: Unallowable executive compensation and advertising, lobbying, and M&A activity.
- (d) 31.205-1: Unallowable advertising costs. (e) 31.205-14; 31.205-46: Unallowable entertainment, alcohol and costs exceeding per diems.
- (f) 31.205-1; 31.205-8; 31.205-22: Unallowable advertising, contributions, and lobbying expenses.
- (g) 31.205-1; 31.205-22; 31.205-27: Unallowable public relations, lobbying, and M&A support.
- (h) 31.205-6: Excess bonus/compensation.
- (i) 31.205-41: Unallowable tax penalties.
- (j) 31.205-41: Deferred State income tax payments.
- (k) 31.205-22; 31.205-27; 31.205-47: Unallowable lobbying, M&A support, and settlement expenses.
- (l) 31.205-1; 31.205-46: Unallowable advertising and travel expense in excess of per diems.

See accompanying Notes to Statement of Direct Labor, Fringe Benefit, and General Overhead

SOQ Requirements (Insurance)

- The successful proposer shall provide the required Proof of Insurance within ten (10) calendar days of the execution of the resulting contract and prior to performing any work under such contract.
- If such exceptions are not requested via the Insurance Requirement Form (IRF) with the SOQ, compliance will be assumed. **The prime shall submit one IRF for any and all insurance exceptions requests.**
- Proof of Insurance required to be submitted to Alameda CTC:
 - Prime: All Insurance
 - Sub: Professional Liability Insurance, if applicable
- Notice to Proceed will be issued after execution of agreement and review of compliance.

SOQ Requirements (Insurance)

- If such exceptions are not requested via the Insurance Requirement Form (IRF) with the SOQ, compliance will be assumed. **The prime shall submit one IRF for any and all insurance exceptions requests.**

Part B – Insurance Exception Request

Identify the name of each firm (i.e., prime or subconsultants) and the specific insurance provision for which an exception is being sought, if any, and the requested revision(s) in the table below.

Firm Name	Insurance Provision	Requested Insurance Exception

SOQ Requirements (QA/QC)

The prime proposer is responsible for **ensuring the completeness and accuracy of all documents submitted** with the SOQ. This includes vetting subconsultant(s) documents.

- Some common discrepancies include:
 - Various forms missing dates, names, addresses, and signatures
 - Missing proof of LBCE certification
 - Resources Form missing complete list of all participating firms in SOQ, missing complete list of vendors or contractors

SOQ Requirements (References)

References Forms

A minimum of three (3) completed Reference Questionnaires for each key team member; **none of the references shall be from Alameda CTC.**

➤ Proposers

- Communicate to references the instructions and requirements for this process as outlined in the RFQ.
- Provide reference project information (i.e., project details) in SOQ.

➤ References

- Complete and submit the web-based **Reference Questionnaire** by or before the SOQ due date.

SOQ Requirements (Submittal)

- **Technical SOQ (without cost elements):**
 - Searchable PDF format
 - Resources Form in Excel **and** PDF formats.
- **Cost Proposal (in a separate digital folder labeled “ Cost Proposal Attachment”):**
 - Form Excel **and** PDF formats.
- Deliver via email attachment or file sharing service.
- Files should be clearly named.
- Allow sufficient delivery time to ensure timely receipt by Alameda CTC; submittals that are late, sent by fax, **or** in hard copy will not be accepted.

Evaluation Criteria

SOQ Criteria	Maximum Points
Understanding the Objectives and Work Requirements.	20
Qualifications and Expertise.	40
Management Approach.	15
Capacity and Availability.	15
Ability to Meet or Exceed Applicable LBE and SLBE Goals	10 (5 for each goal)
Total:	100

Interview Criteria	Maximum Points
Understanding the Objectives and Work Requirements	15
Qualifications and Expertise.	30
Management Approach.	20
Capacity and Availability.	15
Effectiveness of Interview	10
Ability to Meet or Exceed Applicable LBE and SLBE Goals	10 (5 for each goal)
Total:	100

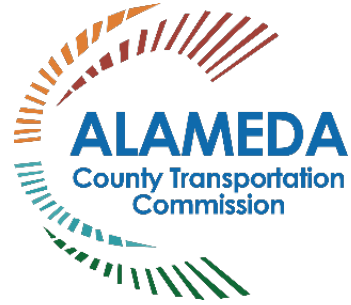
Award

- Proposer with the highest average ranking based on the Selection Review Panel's evaluation using the Proposer Interview Criteria, which does not include the initial evaluation or ranking of the technical SOQs.
- If interviews are not held, proposers will be ranked based on the technical SOQs.

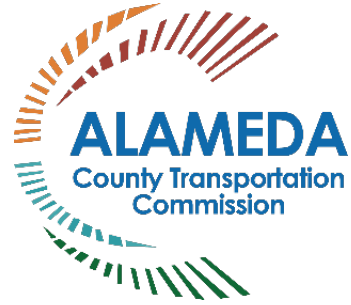
Sole Point of Contact:

Valerie Vijil (vvijil@alamedactc.org)

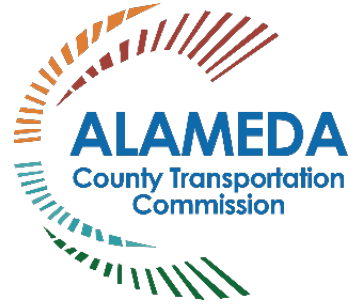
All communications should be directed to the Sole Point of Contact. **Do not contact other agency staff, project team members, or panel members throughout this procurement process.**



Questions Submittal



Q&A



Thank You

For more information, visit

www.AlamedaCTC.org