



Standard Request for Qualifications

FOR

**Parks, Recreation, Trails and Open Space Master Plan,
Parks, Recreation, Trails and Open Space Impact Fee Facilities Plan, and
Parks, Recreation, Trails and Open Space Impact Fee Analysis**

(4-24-2015)



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SUMMARY SHEET

Overview: Santaquin City desires to have an independent consultant update its Parks, Recreation, Trails and Open Space Plan and prepare a Parks, Recreation, Trails and Open Space Impact Fee Facility Plan (IFFP) and Impact Fee Analysis (IFA) based on that update. The IFFP and IFA must be prepared in accordance with Utah Code, §11-36a.

Study Location: The Parks, Recreation, Trails and Open Space Master Plan will cover the current annexation policy plan boundaries of Santaquin City. The IFFP and IFA shall cover the current Santaquin City boundaries.

Source of Funding: The requested studies will be funded by Santaquin City.

Project Administrator:

Dennis L. Marker, AICP
Community Development Director
275 West Main Street,
Santaquin City, UT 84655
Office Phone: (801) 754-1923
dmarker@santaquin.org

Date	Selection Schedule Item
April 29 – May 29, 2015	Advertisement of RFP
May 19, 2015	Mandatory Pre-Proposal Meeting
May 27, 2015	Last Day for Questions
May 29, 2015	Proposals are due at 1:00 PM
June 1, 2015	Santaquin Selection Team Review Meeting
June 11, 2015	Possible Consultant Interviews by Selection Committee
June 17, 2015	Possible City Council Approval of Award

Key Dates: See Table at right.

Advertisement: This request for qualifications shall be advertised April 29 and May 6, 2015 in the Payson Chronicle, and on bidsync, the Santaquin website (www.santaquin.org), and the Utah Public Meeting Notice website beginning April 29, 2015.

Mandatory Pre-Submittal Meeting: The Project Administrator will conduct a pre-proposal meeting to provide additional information and answer questions about the request. Persons desiring to submit proposals are required to attend. Firms who may be partnering on a proposal need only have a single representative of the partnership in attendance at the meeting. The meeting will be held at 10:00 AM in the Santaquin Recreation Building at 45 W 100 South.

Questions About Request: All questions regarding this request are to be submitted in writing to the Project Administrator via email or thru BidSync. Final time for submitting questions is May 26, 2015 at 5pm.

Proposal Requirements: Submit an electronic PDF file emailed directly to the Project Administrator which meets the Guidelines for Preparing a Statement of Qualifications contained in this request. Submittals submitted thru BidSync **will not** be accepted.

Consultant Selection Process:

The consultant selection process is outlined in Appendix C of this request. In general it will include evaluation of statements based on a determined point system and may involve interviews and formal bid considerations from selected firms or individuals.

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ADVERTISEMENT

NOTICE OF CONSULTANT SERVICES

Santaquin City is seeking the services of a qualified consultant to **update the Santaquin City Parks, Recreation, Trails and Open Space Master Plan** and **prepare the Santaquin Parks, Recreation, Trails and Open Space Impact Fee Facilities Plan and Parks, Recreation, Trails and Open Space Impact Fee Analysis**. These studies will be prepared in accordance with current Impact Fee laws and enable the city to determine appropriate transportation related capital improvement projects for which impact fees may be collected and utilized.

If you are interested in submitting a Proposal, information on the Request for Proposals and Guidelines for Preparing a Proposal will be available April 29, 2015 and may be obtained from the Santaquin City Web site www.santaquin.org. **The deadline for submitting the Statement is 1:00 p.m. on May 29, 2015.** The right is reserved by Santaquin City to reject any and all submittals.

Santaquin City encourages prime consultants to use Disadvantaged Business Enterprise and Women's Business Enterprise as sub-consultants where practicable.

April 29, 2015

Santaquin City
Dennis L. Marker
Santaquin Community Development Director

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Introduction

The current Santaquin City Parks, Recreation, Trails and Open Space Capital facility plan (Plan) was adopted in 2008. The current Parks and Recreation impact fee was adopted at the same time under older State Impact Fee laws. Due to impact fee law changes, significant population growth and construction of many capital recreation projects, Santaquin needs to update its Plan and have an Impact Fee Facility Plan (IFFP) and Impact Fee Analysis (IFA) prepared accordingly. The Anticipated Scope of Work for the Project is outlined in Appendix B of this request.

It is anticipated that this plan will mirror the recently updated and award winning City General Plan: A Community Prospering in Country Living. The current plan was updated and re-adopted in 2014 after lengthy public input. Feedback from neighborhood areas resulted in an extensive trail and park system being incorporated into the general plan. Citizens and leaders also desired to develop plans for expanding facilities for our annual rodeo (6th consecutive Utah RMPA rodeo of the year), developing a sports complex, and begin considerations for a recreation center. All of these interests should be addressed in the new Plan while, at the same time, assuring compliance with current Impact Fee laws.

Project Dates:

Consultants are required to meet the information submittal deadline dates outlined in the Summary Sheet above. Firms who fail to meet these dates will be considered non-responsive. Consultants are also advised to meet the dates set for the oral interviews, if selected for an interview.

Key Personnel

Qualifications:

The Consultant shall be responsible to ensure that all personnel listed in their submitted SOQ be qualified through training, experience, and appropriate certification for the tasks assigned and understanding of pertinent laws within the State of Utah.

Required Availability:

When Consultants list personnel to be used on this Project, the Consultant is agreeing to make those personnel available to complete work on the Project at whatever level the Project requires.

Required Percentage of Work for Prime Consultant:

The Consultant must perform work valued at not less than **51%** of the total work, excluding specialized services, with its own staff. Specialized services are those services or items that are not usually furnished by a consultant performing the particular type of service contained in this RFQ.

Payment for Services

Progress payments can be made to the selected Consultant. The city will retain five-percent of any invoiced amount for work in progress on specified tasks. Final payment, including any retainage, for specified tasks shall be made after all of the work has been completed and the final estimate, project records, and documentation have been received and accepted by Santaquin City as accurate and complete. Penalties may be assessed for failure to perform in a satisfactory manner. Payment terms are negotiable with the final contract for services.

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Applicable Federal and State Regulations

The Consultant shall conform to all applicable local, state and federal regulations.

Authorization to Begin Work

Notice to proceed will be given by Santaquin City as soon as the contract is approved and signed by all parties and returned to Santaquin City.

Required Statement Contents

The SOQ from the Consultant should contain the information identified in Appendix A.

Statement Evaluation Procedures

The SOQ shall be evaluated by Santaquin City in accordance with the criteria described in Appendix C.

Conditions of Proposal

All costs related to the preparation of the SOQ and any related activities such as interviews are the sole responsibility of the Consultant. Santaquin City assumes no liability for any costs incurred by Consultants throughout the entire selection process.

Disposition of Statements

Statements become the property of Santaquin City, are treated as privileged documents, and are disposed of according to Santaquin City policies, including the right to reject all statements. The statement of the successful Consultant shall be open to public inspection for a period of four years after completion of the contracted work. Proposals of Consultants who are not awarded a contract shall also be open to public inspection and will be destroyed after two years from when the contract is executed with the selected Consultant.

If the Consultant selected for award has required in writing the nondisclosure of trade secrets and other proprietary data so identified, the Project Administrator shall examine the request in the statement to determine its validity prior to award of the contract. If the parties do not agree as to the nondisclosure of data in the contract, the Project Manager shall inform the Consultant in writing what portion of the statement will be disclosed and that, unless the Consultant withdraws the statement, it will be disclosed. If the Consultant withdraws their Statement, the Consultant will not be awarded the contract.

Ownership of Documents

All documents, drawings, photographs and any other written, electronic, or graphic material, however produced, received from the City and used by the Consultant in performance of its services shall remain under the ownership of the City. All drafts or working papers, drawings, internal memoranda of any kind, photographs and any other written or graphic material which are not included in the final Project deliverables, however produced or prepared by Consultant, will remain the property of the Consultant. Owner and Consultant shall be co-owners of the final documents, excepting the right to use proprietary information, names or logos without the prior written consent of the other party.

Project Assignment

Santaquin City reserves the right to assign all responsibilities, rights, contracts, and any other obligations associated with this project as it deems appropriate, including, but not limited to, payment for services and ownership of materials.

Appendix A

Guidelines for Preparing a Standard Statement of Qualifications

INTRODUCTION

These guidelines were developed to standardize the preparation of a Standard Statement of Qualifications (SOQ) by Santaquin Consultants for planning/engineering services on a project. Submitting an SOQ is the beginning of the selection process and is used as the basis for selecting or for short-listing Consultants. If Santaquin determines interviews are necessary prior to selection, a minimum of two and a maximum of five Consultants will be short-listed and invited to an interview by Santaquin City.

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

STATEMENT OF QUALIFICATION SECTIONS

The Statement of Qualifications should contain the following sections in the order listed.

1. Cover Page
2. Introductory Letter
3. Project Team
4. Relevant Experience
5. Approach to the Project
6. Project Schedule

SOQ EVALUATION CRITERIA

1. Cover Page - An optional cover page may be included with the submittal. The cover page may include the Firm's logo and contact information and the Project name. The cover page **may not include** any content (informational graphics, text, etc.) that should be included within the body of the submittal. If content (informational graphics, text, etc.) is included on the cover page, the cover page will be counted as one of the allowed pages.

No evaluation points are assigned to this section and the cover page will not count as one of the allowed pages, so long as the above instructions are followed.

2. Introductory Letter - The introductory letter should be addressed to:

Dennis L. Marker, Community Development Director
275 West Main Street
Santaquin City, UT 84655

In **one page**, express your interest in the project, state qualifications to do the work, and recount any summary information on the project team or yourself that may be useful or

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informative to Santaquin City. Include the mailing address, e-mail addresses, and phone numbers of the primary contact person for this consultant selection process in the introductory letter.

No evaluation points are assigned to this section and the introductory letter will not count as one of the allowed pages.

2. **Project Team** - The Selection Team will consider how well the qualifications and experience of the members of the project team relate to the specific project. The following information should be provided.
- Project team flow charts indicating chains of communication between the Team, any sub-consultants, and city personnel.
 - Describe the qualifications, experience, and availability of key personnel on your proposed project team. (NOTE: Do not include percentages of availability nor wages/costs of personnel hours as this may be misinterpreted.)

A maximum of 20 points is available for this section.

3. **Relevant Experience** - Provide a list of similar projects you have **completed** since 2011. This may be in spreadsheet form or as information pages, but should include the following minimum points of information:
- Name of Project Manager
 - Year Completed
 - Project Name
 - Project Description
 - Project Cost
 - Services Performed
 - Reference Contact and Telephone Number

In addition to the above information, provide a copy of your best recently completed recreation plan. This plan should be one of those provided in the above relevant experience. This does not include any associated IFFP or IFA.

A maximum of 35 points is available for this section.

4. **Project Management** - The Selection Team will evaluate how well you have planned a basic course of action, what alternatives and/or preliminary approaches are proposed, and what provisions are identified for dealing with potential impacts, impediments, or conflicts. Explain the following:
- Provide a Project schedule of meetings, timeframes of work, deliverable milestones, noticing periods, and anticipated final completion of plans and adoption of impact fees.
 - Describe the course of action proposed to meet the goals and objectives of the project. Be realistic, clear, and concise.
 - Identify potential impacts, impediments, conflicts, or potential mitigation.

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- Describe your firm's capability to perform the work.
- Describe any unique qualifications your firm has to perform this type of work.
- Describe your firm's internal quality and cost control procedures.

A maximum of 45 points is available for this section.

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 Department's Selection Team.

1. **Electronic PDF File of SOQ must be emailed to dmarker@santaquin.org**
SOQ file must not exceed 5MB and should be labeled with consultant name and project name (e.g. Santaquin_2015RecreationPlanUpdate). The sample recreation plan document required under Relevant Experience may be emailed or hand delivered separately so long as it is received prior to the Project Due Date.
2. **Color is allowed**
3. **Page format should be 8½" x 11"** except that a list of projects under relevant experience may utilize one 11" x 17" Page
4. **One-inch (1") Margins** – (Exceptions: Consultant Name/Logo and Page Headers/Footers may be within margin)
5. **10 Pt Font and 12 Pt Line Spacing, Minimums** – (The minimum font size is 10 point font or greater everywhere in SOQ including graphics, unless the graphics are a duplication from another source and the source is referenced. The minimum line spacing is 12 point.)
6. **6 Page Maximum** – (The Statement of Qualifications has a maximum page limit of six pages.) A page is defined as a single-sided 8.5" x 11" or 11" x 17" sheet that contains text, pictures, tables, graphs, charts, plan sheets, or any other graphics. There is a limit of one 11" x 17" sheet.

Penalties: Any SOQ that exceeds the 6 page maximum will receive a three-point penalty per page over the limit. Any violation of numbers 1-5 of the format requirements will receive an additional 1 pt penalty per violation for a total penalty of 15 points.

Appendix B: Scope of Work

INTRODUCTION

Santaquin City's current Parks, Recreation & Open Space Facilities Plan (CFP) was adopted in 2008. It provides analysis of recreation service levels, facilities, proposed park locations, proposed improvements to existing facilities, possible funding methods and an implementation schedule based on anticipated growth. The CFP is comprehensive in scope and was prepared to address build out conditions of Santaquin City. It is anticipated that an independent consultant can utilize the information available in the CFP to prepare a revised CFP and by extension a recreation Impact Fee Facility Plan and Analysis. It is expected that the work will be done in consultation with city planning and engineering staff and in accordance with Utah Impact Fee laws.

The consultant, working with Santaquin staff, will develop a technical advisory committee and stakeholder group that will report to the Santaquin City Council. The committees shall meet monthly or as needed and the successful consultant shall staff each meeting as needed.

The consultant should thoroughly understand and be able to communicate concepts of healthy cities, recreation economics, urban design, facility design, land use relationships, trail planning and similar recreation issues to the committee and city council. It is anticipated that the plan will provide guidance and strategy on rodeo facility expansion, a new sports complex and recreation center. Some investigative work on these issues was completed by city staff recently and is expected to be furthered by the selected consultant.

PURPOSE

The Purpose of this study is to ultimately give Santaquin City officials a collaborative recommendation for prioritized recreation projects for which impact fees and other capital funds can be collected and spent.

ANTICIPATED TASKS

Tasks may include the following activities (actual contract tasks will be identified through a scoping meeting after consultant is selected):

Task 1. Steering Committee Formation and Kickoff

- b. Hold a Steering Committee meeting to refine the Scope, Budget & Schedule.
- c. Identify possible Stakeholders for Stakeholder Committee. (Invitation of stakeholders to join the Project will be done by City staff.)
- d. Review background information - Inventory of existing/previous recreation planning work and any additional work needed. City general plan, development agreements, other studies conducted by City.
- e. City tour/site analysis of recreation facilities and potential development areas

Task 2. Stakeholder Committee Formation and Kickoff

- a. Stakeholder workshop preparation.

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- d. Conduct Stake holder meeting to review background information - Inventory of existing/previous recreation planning work and any additional work needed. City general plan, development agreements, other studies conducted by City.
- e. City tour/site analysis of recreation facilities and potential development areas

Task 3. Determination of Existing Conditions and LOS.

- a. Gather current City recreation facility inventory (City can provide)
 - 1. Park Lands
 - 2. Park Improvements and facilities
 - 3. Trails
- b. Identification of area recreation amenities and possible/facilities
 - 1. Public Lands (Utah DWR, USDA Forest Service, USDI BLM or BOR)
 - 2. Recreation Areas or Cultural Locations
 - 3. Private Facilities
 - 4. Rail systems
- c. Review of current city plans
- d. Determine current carrying capacity or needs in existing facilities.
- e. Determine Level of Service provided within community.
- f. Provide data of current conditions noted in this task in ESRI ArcMap compatible format.
- g. Determine potential annual maintenance costs for current park systems.

Task 4. Determination of Existing and Future System Needs

- a. Identify major new residential, commercial, and regional developments that may impact recreation facilities in Santaquin.
- b. Update existing and projected recreation needs for 10, 20 and 30 year horizons using population forecasts and development agreement information.
- c. Conduct community survey to determine interests for new facilities and build scenarios for parks (e.g. Neighborhood Parks, Regional Park, or Major Facilities Emphasis)
- d. Conduct community survey to determine interests for new trail facilities and build scenarios (urban, natural, equestrian)
- e. Refinement of existing and projected needs based on public comment and surveys.
- f. Identify issues relative to community preferred build scenarios.
- g. Stakeholder workshop facilitation to determine preferred scenarios and facilities. Stakeholders will be asked to select preferred elements of scenarios including preferred recreation options
- h. Provide Evaluation of preferred build scenarios and facilities (economic, land use, financial, etc.)
- h. Present final findings and recommendations to Stake holders for final modifications, if any.
- a. Prepare displays with information, mapping, and illustrations of build options and facilities for public open house.

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- i. Conduct Public open house to present plan findings and recommendations.
- j. Prepare final capital facility plan to be presented to the City Council for adoption.

Task 5. Determination of Existing Level of Service

- a. Analysis of current recreation facilities and possible means of determining current level of service, defensible under current impact fee laws.
- b. Determination of additional capacity of recreation facilities while still able to meet current LOS
- c. Mapping and illustrating available reserve capacity

Task 6. Determination of Future Projects to Accommodate Growth

- a. Identification of modifications needed to current recreation facilities needed to cure any deficiencies in meeting the preferred LOS.
- b. Provide a maintenance plan with estimated costs for existing recreation facilities.

Task 7. Identification of Funding Options for Future Projects

Task 8. Preparation of Recreation Impact Fee Facilities Plan

- a. Based on information obtained in Tasks 1-6, prepare an IFFP in compliance with Utah Code 11-36a
- b. Provide all required notices and prepare documents necessary to conduct appropriate hearings for the Plan

Task 9. Preparation of Transportation Impact Fee Analysis

- a. Based on information contained in the IFFP under Task 8, prepare an IFA in compliance with Utah Code 11-36a
- b. Provide all required notices and prepare documents necessary to conduct appropriate hearings for the Analysis

QC/QA Plan Requirements

- The Consultant may be asked to prepare, distribute, and implement a Quality Control/Quality Assurance Plan for the project if QC/QA issues are detected.
- Document Control: All documents will be maintained in both an electronic and hard copy form. Each document will have a uniquely specific location in both electronic and hard copy formats.

Santaquin Furnished Items

- Current Studies Available: (All Master Plans and General Plans can be found on the Santaquin City website at www.santaquin.org)

Appendix C: Selection Review Process

Selection Committee.

Any or all of the following may comprise the consultant selection committee: Santaquin City Mayor, City Council representatives, City Manager, Community Development Director, City Engineer and members of the Planning Commission and Recreation Committee.

Proposal Review.

Copies of all submitted proposals will be provided to the Selection Committee after the closing date. Within 5 business days of the closing, the Committee will convene a review meeting. They will review and score the SOQ's individually based on the evaluation criteria and submit their scores and comments to the Project Administrator. The Administrator will tally and compile the scores and comments. The Selection Team will then discuss the scores and comments and determine whether interviews are necessary or whether the selection may be made based on the SOQ scores.

Selection Interviews

If interviews are warranted, the Selection Committee will develop the format of interviews in the Proposal Review Meeting. Interview times and places will be assigned and interviewing groups will be given additional information at least 10 days before interviews.

If the Selection Team determines interviews are necessary, the following project-specific topics may be some, but not all of the issues discussed in the interviews.

- Approach to the Project
- Schedule Control
- Management of Project
- Understanding of Current Impact Fee laws

Formal Bids

Consultants invited to participate in oral interviews will be asked to submit a formal bid for the project. A project bid form will be provided at least 10 days before interviews. Bids shall be submitted to the Project Manager before any oral interviews are conducted, but will not be opened until all oral interviews and presentations are completed and Selection Committee scores are tabulated. Bid prices will be factored into the final consultant selection. The weight of the interviews and bids will be determined during the Selection Team Meeting and interviewing groups will be notified in advance of interviews what the weighting factors will be. Additional information will be provided to interviewing groups at least 10 days before interviews.

“Selecting By Consent” Process

The final selection process will be performed using the “Selecting by Consent” (SBC) process developed by Santaquin City staff. The SBC process is a scoring process that aids the Selection Team in developing the final ranking of consultants through a collaborative process. In this process each segment and question of the interview is weighted in advance during the Selection Team Meeting. After the interviews are conducted, the Selection Team scores each segment and question by consent. Consent is defined as the willingness of all Selection Team members to accept a decision reached by a collaborative process. The final selection ranking of consultants is based on the final scores developed by the Selection Team in combination with results of the submitted formal bids.

END.