



**TOWN *of*
WAKE FOREST**

REQUEST FOR QUALIFICATIONS (RFQ #22-0001)

for a

TOWN OF WAKE FOREST PUBLIC TRANSIT PLAN

DATE ISSUED

Monday July 11, 2022

QUESTIONS AND CLARIFICATIONS DUE DATE

Friday, July 22, 2022

1:00p.m.

DUE DATE

Friday, July 29, 2022

2:00 p.m.

E-Mail Address Submittal (Preferred)

dbruchhaus@wakeforestnc.gov

Physical Acceptance Location

**Town of Wake Forest Town Hall
Attn: Dylan Bruchhaus, Planner II
301 South Brooks Street, Ground Floor
Wake Forest, NC 27587-2901**

Mailing Address

**Town of Wake Forest Town Hall
Attn: Dylan Bruchhaus, Planner II
301 South Brooks Street
Wake Forest, NC 27587-2901**

TABLE OF CONTENTS

I.	Background	3
II.	Plan Objectives	4
III.	Scope of Services	4
IV.	Content and Format of Qualification Package.....	7
V.	Submittal Process Details	9
VI.	Questions and Clarifications.....	9
VII.	Statement of Qualifications Submittal	9
VIII.	Anticipated Schedule	9
IX.	Selection Process	10
X.	Evaluation Criteria	10
	APPENDIX A.....	11

Notice

The Town of Wake Forest (as referred to as “the Town” or “Wake Forest”) is soliciting Statement of Qualifications from firm(s) or organization(s) qualified to provide professional services in its efforts to prepare a Public Transit Plan focused on the expansion of transit service in the Town. The Town seeks to identify qualified consultants who have robust knowledge in developing implementable Plans, experience with public meetings and outreach, quality graphic design abilities, and project and time management.

All respondents to this Request for Qualifications (RFQ) are subject to the instructions communicated in this document and are cautioned to thoroughly review the entire RFQ and follow instructions carefully.

I. Background*Town of Wake Forest*

Wake Forest is primarily located in Wake County, one of the fastest-growing counties in the country, and is located minutes north of Raleigh, the state’s capital. In the past few decades, Wake Forest has transformed from a small, rural town into a sizeable community of over 50,000 that will continue to grow over the next decade.

Existing Bus Service - Wake Forest Loop (WFL)

The Town of Wake Forest began offering bus service in 2008 as a partnership between the City of Raleigh and the Town of Wake Forest, with GoRaleigh operating the route and the City of Raleigh paying a portion of the total cost, equivalent to the percentage of the route in Raleigh. The fare-free fixed-route service, the Wake Forest Loop, offered Wake Forest residents access to commercial and shopping opportunities, medical facilities, and public services in the Wakefield neighborhood in Raleigh.

In November 2016, the voters of Wake County approved the Wake Transit Referendum that created a dedicated half-cent sales tax to expand and improve the public transit network throughout the County. The Wake Transit Plan that came out of the referendum established “4 Big Moves”, including Big Move #4: Enhanced Access to Transit. This move led to the creation of the Community Funding Area, managed by the Capital Area Metropolitan Planning Organization (CAMPO), to expand local transit within eligible municipalities in the County.

CAMPO approved the Wake Forest application for an operating project through the Community Funding Area program, and in January 2020, the Town implemented a reverse route of the Wake Forest Loop. The current bus service consists of two loops, Loop A and Loop B. Each loop has one-hour headways and runs in opposite directions on the same fixed route. The bus service continues to be fare-free and is operated by the City of Raleigh.

Existing Bus Service - Wake Forest-Raleigh Express (WRX)

The Town also is served by the Wake Forest-Raleigh Express (WRX), a commuter service route from GoTriangle, and operated by GoRaleigh. The bus service runs hourly service during peak hours between the Downtown Wake Forest, Triangle Town Center, and Downtown Raleigh. A park-and-ride facility for 25 vehicles is located in Downtown Wake Forest at 235 E Holding Ave.

Future Transit Service - S-Line Commuter Rail

The S-Line Commuter Rail project by NCDOT has identified three potential locations for commuter rail stations in Wake Forest. Timing for the project is dependent on funding availability by NCDOT. However, the Plan will need to ensure connections are made with these potential station locations.

II. Plan Objectives

The Plan has three main planning objectives that are interrelated with one another.

1. **Evaluate existing service.** The Plan should evaluate existing transit routes and address any potential routing changes to the Wake Forest Loop or WRX to increase ridership and access.
2. **Understand the viability of alternatives to fixed-route services.** The Plan should evaluate the use of microtransit, fixed-route bus service, hybrid strategies, or any other proven service model and determine the best solution for the Town of Wake Forest.
3. **Expansion of service.** The Plan should provide a recommended solution for transit expansion, including the service model type, cost of expansion, and implementation steps.

III. Scope of Services

The Town of Wake Forest Transit Plan should include the following information and analysis. Alternative services and deliverables may be proposed on evidence of the need to meet the purpose of the RFQ. RFQs that do not include all tasks will not be considered.

Task 1 - Project Timeline***Deliverable: Timeline and Work Schedule***

- 1.1 Develop an estimated timeline for the duration of the project. The timeline should include project phasing for primary tasks, key deliverables, community engagement meetings, presentations to the Planning Board and Board of Commissioners, and staff review periods for deliverables.
- 1.2 Develop a corresponding work schedule that demonstrates how the submitting firm will manage its responsibilities and work scheduled to be performed, including work of and with Town personnel

Task 2 - Public Outreach

Deliverables: Public Involvement Plan, surveys, presentations, handouts, social media information graphics, and any other materials needed for graphic communication

- 2.1 Develop a Public Involvement Plan (PIP). The PIP will need to address any planned outreach events for the Plan, including surveys, the use of social media, pop-up events,

stakeholder interviews, open houses, public meetings, and public hearings. The PIP will need to address equitable outreach and targeted engagement to reach the most vulnerable populations who rely on public transportation.

- 2.2 Conduct an online survey and on-board bus survey to gather community input. The consultant should design an online survey to be hosted on the Town's engagement platform. The proposal should address other methods of distributing surveys to reach vulnerable populations. The consultant should also design an on-board survey to be administered on the Wake Forest Loop and Wake Forest-Raleigh Express. The proposal should address the goals of the on-board survey and the execution of the survey. Data collected and any results will need to be provided to Town staff.
- 2.3 Conduct stakeholder interviews with internal and external stakeholders to understand the transportation needs of the community and to gather feedback from stakeholders providing services to vulnerable populations.

Task 3 - Evaluate Existing Plans

Deliverable: Brief report summarizing applicable Comprehensive Plan recommendations, where they fit into this Plan, and how they can be implemented

- 3.1 Review adopted plans for existing public transit recommendations. The consultant team, at a minimum, should review the following existing Wake Forest Plans:

Wake Forest Community Plan (2022)
 Wake Forest Comprehensive Transportation Plan (2019)
 Wake Forest Northeast Community Plan (2021)
 Wake Forest Renaissance Plan (2017)
 Wake Forest Public Art Vision Plan (2009)
 Wake Forest Historic Preservation Plan (2022)¹

Task 4 - Review Existing Conditions & Market for Public Transportation

Deliverables: Outline for the Existing Conditions Report and Existing Conditions Report

- 4.1 Analyze relevant demographics of the Town. The Existing Conditions Report should detail demographics such as race, household income, no-vehicle homes, etc., and provide a clear takeaway of each in the Plan.
- 4.2 Analyze the Town's transit propensity. The consultant should develop a transit propensity analysis showing which areas in Town have the highest propensity or support for transit.
- 4.3 Analyze existing popular origins and destinations in the Town.

¹ The Town is currently in the process of updating the Historic Preservation Plan and the Plan is on schedule to be adopted by the Board of Commissioners on September 20th. During Task 3, staff will forward the latest draft of the Plan for evaluation and review.

- 4.4 Evaluate the performance of existing fixed routes. The consultant team should evaluate the performance based on the Community Funding Area metrics and other measurable metrics provided by GoRaleigh.
- 4.5 Draft an Outline for the Existing Conditions Report. Before drafting the Existing Conditions Report, the consultant team will need to provide an outline of the report to be reviewed by staff.
- 4.6 Develop the Existing Conditions Report. The report will be presented to the Planning Board and the Board of Commissioners with the Task 5 Alternate Services Model Report. Two staff review cycles should be included during the review.

Task 5 - Evaluate Alternate Service Options

Deliverables: Outline for the Alternate Services Model Report and Alternate Services Model Report

- 5.1 Evaluate alternate service scenarios, including fixed-route, microtransit, a hybrid model or any other viable service model operating in the United States. The evaluation should include each service model analyzing the existing route, the Town's transit needs, and service expansion.
- 5.2 Develop cost estimates for each service model and implementation steps for each service model.
- 5.3 Evaluate the relationship of alternate service models and bus service expansion as they relate to the Wake County Transit Plan Community Funding Area.
- 5.4 Draft an Outline for the Alternate Services Model Report. Before drafting the Alternate Services Model Report, the consultant team will need to provide an outline of the report to be reviewed by staff.
- 5.4 Develop the Alternate Services Model Report. The consultant team will present the report to the Planning Board and the Board of Commissioners with the Task 4 Existing Conditions Report. Two staff review cycles should be included during the review.

Task 6 - Final Document

Deliverables: Outline for final Public Transit Plan document and the final Public Transit Plan document

- 6.1 Develop a final public transit scenario that includes cost estimates and project implementation of the service model, including any expansion of existing services.
- 6.2 Develop an action item matrix for implementation. This action items should also address issues such as public art integration, last mile connections, and potential UDO changes.
- 6.3 Draft an Outline for the final Public Transit Plan. Before drafting the Public Transit Plan, the consultant team will need to provide an outline of the report to be reviewed by staff.

- 6.4 Develop the Public Transit Plan. The consultant team will present the final report to the Planning Board and the Board of Commissioners. Two staff review cycles should be included during the review.

Each task shall be combined and form the basis for a comprehensive report titled “Town of Wake Forest Public Transit Plan,” which clearly defines the Plan’s preferred transit service model and implementation of that service. The Plan will be subjected to multiple reviews, as noted in the task list, and Town staff will advise the consultant of needed changes. When the changes are finalized, the consultant will be advised to produce a draft for presentation to the Board of Commissioners and the Planning Board. Staff will review the draft presentations and advise the consultant of any needed changes. Following the presentation(s), additional review cycles may be necessary to incorporate any recommended changes.

Media and File Formats

Reports shall be delivered to the Town in their native format(s) (current software version) and Adobe PDF format. The Town’s preference for reports and final documents to be produced in Adobe InDesign. Reports distributed to stakeholders or placed on the internet for public access will be in Adobe PDF format. Presentations shall be produced and delivered in Microsoft PowerPoint, and public versions will be delivered in Adobe PDF format. Images and figures used for public outreach shall be produced by the consultant.

Reports are to be dated and identified as either draft or adopted, as appropriate. Submittal of final reports shall be accompanied by the files, in their native format, that were used to generate graphics displayed in the reports.

IV. Content and Format of Qualification Package

A selection committee will evaluate the submittals and may elect to select the most qualified firm based on the responses as submitted or elect to conduct interviews with multiple firms prior to recommending a firm.

The submission shall be a maximum of 25 pages front and back or 50 pages single-sided. Only digital Work Samples, which are excluded from the page limit, will be accepted. Submittals shall include the following:

Letter of Interest:

The letter of interest provided in the submission shall include the following:

- The name and address of the prime consultant and the state in which it is incorporated and chiefly located.
- The name and address of each sub-consultant and the state in which each entity is incorporated and chiefly located if a sub-consultant is part of the team.
- A brief description of the proposer (prime and sub-consultants, if applicable), and its interest in performing the required professional services.
- The name, address, phone, and e-mail address of the designated contact for the proposer (prime consultant).

- A statement indicating any judgments against the proposer (prime, sub-consultants, and third-party consultants) within the last five (5) years, or pending litigation, related to professional conduct or services.
- All addenda to the RFQ document (each addendum must be identified), if applicable.
- Signature of a duly authorized official of the consultant firm or other person fully authorized to act on behalf of the firm or team.

Firm and Staff Qualifications:

The submission shall include a general description of the firm and its background as it relates to this project. Specific information regarding the firm and staff shall also be submitted and include:

- Information regarding the firm's previous experience with similar or related projects performed within the last 5 years, including a brief description of these projects and project staffing.
- Information demonstrating the firm and staff capabilities to perform all aspects of this project.
- Information regarding the expertise and experience of staff person(s) assigned to work on the project. It should also contain specific proposed responsibilities of the project staff person(s).
- Information regarding the project manager's experience and previous projects they have worked on.
- A description and organizational chart showing the structure of the proposer's team, inter-relationships, areas of responsibility and the names and current professional licenses of key personnel assigned to the project along with their areas of responsibility. Note: no substitutions to the proposed project team of the selected firm(s) can be made without the prior written approval of the Town as noted in Appendix A.
- Information on the current and projected workload of key staff to be assigned to this project, including level and magnitude of involvement.
- Three references including client name, address, contact person, telephone number, email, project start and end dates as well as a project description. References should be for similar or related projects on which key staff that are proposed for this project have worked.
- The firm and staff qualification information for each sub-consultant, a description of the services the firm performed, as well as related projects and references, if a sub-consultant is part of the team.

Project Approach:

The submission shall include a response to each task in the Scope of Services and identify how the requirements will be met. Each response will also include, but is not limited to, a detailed statement of how the submitting firm intends to approach the work required.

Work Samples:

The submission shall include three recent work samples of public transit plans prepared for jurisdictions comparable to the Town in terms of existing transit service, transit needs, and demographics. These examples should showcase the graphic communication skills of the project team. Work samples must show graphics and layout that can be performed by the consultant team listed in the proposal.

V. Submittal Process Details

Firm selection will be based on the letter of interest, firm and staff qualifications, project approach, anticipated schedule, and work samples related to preparing transit plans for compatible jurisdictions.

The Town of Wake Forest reserves the right to reject any responses to this RFQ that do not comply with the content and format of the proposal requirements. The Town can also conduct discussions with any or all respondents. The Town accepts no financial responsibility for any costs or expenses incurred by any entity in responding to this RFQ. All submissions may be kept by the Town and may be disclosed to third parties at the Town's discretion.

VI. Questions and Clarifications

All questions shall be submitted to Dylan Bruchhaus, Planner II, via email (dbruchhaus@wakeforestnc.gov), no later than 1:00 p.m. on Thursday, July 22, 2022. Questions submitted later than this deadline will not be considered. An addendum with questions and answers, if necessary, will be published on the Town website by 5:00 p.m. on Monday, July 25, 2022.

VII. Statement of Qualifications Submittal

The deadline for firms submitting qualifications is 2:00 p.m. on Friday, July 29, 2022. No submissions or supporting documents will be accepted after this deadline. Submittals may be emailed to dbruchhaus@wakeforestnc.gov or delivered to:

Physical Acceptance Location

**Town of Wake Forest Town Hall
Attn: Dylan Bruchhaus, Planner II
301 South Brooks Street, Ground Floor
Wake Forest, NC 27587-2901**

Mailing Address

**Town of Wake Forest Town Hall
Attn: Dylan Bruchhaus, Planner II
301 South Brooks Street
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Submittal packages should be enclosed in a sealed envelope marked **REQUEST FOR QUALIFICATIONS – WAKE FOREST PUBLIC TRANSIT PLAN** to the attention of Dylan Bruchhaus, Planner II. All proposal packages and materials submitted hereunder become the exclusive property of the Town of Wake Forest.

VIII. Anticipated Schedule

- 07/29/2022: Submission deadline
- 08/03/2022 – 08/10/2022: Selection committee review of submittals

- 08/11/2022 – 08/16/2021: Virtual interviews conducted with selected consultants, if necessary
- 08/17/2022: Highest ranked firm notified
- 09/16/2022: Contract finalized, and non-selected firms notified
- 09/19/2022: Project commences

IX. Selection Process

This RFQ provides information necessary to prepare and submit qualifications for consideration and ranking by the Town. It is the intent of the Town to appoint a selection committee to review the submitted Statements of Qualifications. This committee will review each qualification submittal and rank the submittal based on the criteria requirements specified within this RFQ. The Town may invite firms for interviews, but this is not a required step in the selection process. At the conclusion of the interviews (if held), the selection committee will rank the firms based on the selection criteria and the interviews. The Town will provide written notification to all firms regarding final selection by September 16, 2022.

Upon completion of the selection process, the highest ranked firm will be asked to submit a fee proposal to begin contract negotiations for a fair and reasonable price. By submitting their Statement of Qualifications in response to this RFQ, respondent accepts the evaluation process as outlined in the following section, acknowledges, and accepts that determination of the “most qualified” firm may require subjective judgments by the Town.

X. Evaluation Criteria

1. Qualifications of the Firm: Outline and specify the qualifications of the firm to provide the requested services as outlined in the scope of work. This shall include any sub-consultants that may be part of the team, if applicable. (20%)
1. Overall Qualifications of the Project Manager and Project Team: Clear identification of the project manager and team personnel that will be assigned to the project. This section shall include the demonstrated project management and quality control methods employed by the team. (20%)
2. Project Approach and Project Understanding: Preference shall be afforded to those firms that, in the opinion of the Town, will be able to adequately respond to requests for consultation meetings or project administration requirements, and firms having a detailed understanding of the project requirements. (35%)
3. Graphic Communication Skills: Work samples showcase an excellent use of graphics, charts, maps, etc. that easily and aesthetically communicate the technical report. (10%)
4. Relevant Experience. (15%)

APPENDIX A

I. General Contract Terms and Conditions

- The selected firm will report directly to the Town of Wake Forest. The selected firm is to administer the contract and to ensure that all work is performed in accordance with the contract requirements. The selected firm will be responsible for providing engineers, technicians, and sub-consultants with the appropriate skills and qualifications to ensure contract compliance. The firm will be directly responsible for oversight of the project for the Town.
- The selected firm will be notified by the Town and will enter contract negotiations for receiving this work. A professional services agreement will be negotiated with the selected contractor based on the proposed scope of work outlined in their proposal.

II. Conflict of Interest Statement:

It is the policy of the Town of Wake Forest that the conduct of officers, directors, project managers, or and all other persons acting as its representatives should be at all times in the best interests of the Town, its members and the general public. In performing their duties, Town representatives should not be influenced by desire for personal gain. Conflict of interest is defined as a situation in which professional judgment or behavior concerning a primary interest (in this case the integrity of the Town) has been improperly influenced by a different interest (such as for financial gain). The prompt disclosure of possible conflicts of interest or of those situations where such a perception could reasonably be anticipated to arise helps to avoid injury to an agreed upon primary interest.

Firm(s) selected for these advertised services shall become aware of and comply with state laws related to gifts and favors, conflicts of interest and the like, including N.C.G.S. 14-234, N.C.G.S. 133-1, and N.C.G.S. 133-2.

Firm(s) selected for Planning Services by the Town will be required to disclose any conflicts of interest for 18 months prior to the submission of the Proposal package to the Town.

If a conflict of interest is not disclosed by the contractor and a conflict of interest is determined by the Town of Wake Forest to exist at a later time, the contractor will not be compensated for their prior work and will be required to reimburse the Town of Wake Forest for any payments received. The Contractor would be immediately dismissed from the contract.

III. Changes in Personnel:

Changes to personnel on project team(s), particularly a project manager, are to be avoided wherever possible. The selected firm must request in writing to the Town for all changes to project team members. The Town will consider requests and may accept the new personnel changes, or may deny the request and consequently, the selected firm may no longer be considered for Planning and Design Services with the Town.

IV. Americans with Disabilities Act (ADA) Compliance:

The Town of Wake Forest will comply with the Americans with Disabilities Act (ADA) which prohibits discrimination on the basis of a disability. The Town of Wake Forest will make reasonable accommodations in all programs to enable participation by an individual with a disability who meets essential eligibility requirements. Town of Wake Forest programs will be available in the most integrated setting for each individual. If any accommodations are necessary for participation in any program or services, participants are encouraged to notify Town staff.

V. Minority/Women/Small Business Enterprise:

It shall be the practice of the Town of Wake Forest Government to provide minority-owned, women-owned, and small business enterprises (collectively "M/W/SBE") as well as other responsible vendors with fair and reasonable opportunity to participate in Town of Wake Forest's business opportunities including but not limited to employment, construction development projects, and material/services, consistent with the laws of the State of North Carolina.

VI. Nondiscrimination Policy:

The policy of the Town of Wake Forest prohibits discrimination against any person or business in pursuit of these opportunities on the basis of race, color, national origin, religion, sex, age, disability, or veteran's status. It is further the policy of the Town of Wake Forest to conduct its contracting and procurement programs so as to prevent such discrimination and to resolve any and all claims of such discrimination.

VII. Insurance and Indemnity Requirements:

To the extent permitted by law, the Consultant agrees to defend, pay on behalf of, indemnify, and hold-harmless the Town of Wake Forest, its elected and appointed officials, employees, agents, and volunteers against any and all claims, demands, fault, actual liabilities, assertions of liability, expenses, suits, or losses, including all costs connected therewith, which may be asserted, claimed, or recovered against or from the Town of Wake Forest, its elected or appointed officials, employees, agents, and volunteers by reason of personal injury, including bodily injury or death and/or property damage, including loss of use thereof resulting from the negligence of the Consultant.

The Consultant further agrees to purchase and maintain during the life of any contracts entered into with the Town the following insurance with an insurance company acceptable to the Town of Wake Forest and authorized to do business in the State of North Carolina:

- **Automobile:** Bodily injury and property damage liability covering all owned, non-owned, and hired automobiles for limits of not less than \$1,000,000 each person/\$1,000,000 each occurrence.
- **Comprehensive General Liability:** Bodily injury and property damage liability insurance shall protect the Consultant from claim of bodily injury or property damage which arises from operations of this contract. The amounts of such insurance shall not be less than \$1,000,000 bodily injury and property damage liability each occurrence/aggregate. This insurance shall include coverage for product/completed operations and contractual liability

assumed under the indemnity provision of this contract. The Town of Wake Forest shall be listed as an "Additional Insured".

- Consultant's Professional Liability: In a limit of not less than \$1,000,000.
- Workers' Compensation and Occupational Disease Insurance:
 - Coverage A – Worker's Compensation: Meeting the statutory requirements of the State of North Carolina.
 - Coverage B – Employer's Liability: \$1,000,000 each accident / \$1,000,000 disease – each employee / \$1,000,000 disease – policy limits.

Certificates of such insurance will be furnished to the Town of Wake Forest Purchasing Manager and shall contain the provision that the Town of Wake Forest be given thirty (30) days written notice of any intent to amend or terminate by either the Consultant or the insuring company. Additionally, the Town of Wake Forest shall be listed as Certificate Holder on COI.

VIII. Notifications

Public Records Notice:

Records received by the Town of Wake Forest in response to a bid solicitation or a request for proposal/qualifications are public records and subject to public inspection and copying. Some bid records are public as soon as received by the Town, others become public at bid opening and others at bid award.

The Public Records law (N.C.G.S. 132-1 *et seq.*) authorizes the Town to withhold from public inspection and copying legitimate and properly marked 'trade secrets'. If a record meets all the following conditions, then the Town may withhold that particular trade secret from a public record inspection request:

- It is a "trade secret" as defined in G.S. 66-152(3); and
- It is the property of a private "person" as defined in G.S. 66-152(2); and
- It is disclosed or furnished to the Town in connection with a bid or proposal; and
- It is marked as "confidential" or as a "trade secret" at the time of its initial disclosure to the Town.

If as part of your bid or proposal, you submit to the Town any record, or portion of a record, that you consider to be a trade secret meeting the definition contained in G.S. 66-152 (2), you may clearly mark the particular record, or portion of the record, that meets the definition of trade secret as TRADE SECRET or CONFIDENTIAL TRADE SECRET, and the Town will be authorized to withhold that particular record or portion thereof, from public inspection. In the event the Town receives a public records request for records you designate as 'trade secret' the Town will notify you and give you the opportunity to, within one week of such notification, confirm in writing that the specific record, or portion of record, that you designated as TRADE SECRET meets the requirements of G.S. 132-1.2 and G.S. 66-152, and the reasons therefore. The Town will require that you indemnify the Town in the event a challenge is brought for the withholding of a record based on your having designated it a trade secret.

Addenda Notice:

It is the respondent's responsibility to ensure that all addenda have been received. Please visit <https://www.wakeforestnc.gov/finance/purchasing-warehouse/bids-announcements> for the most current information.