



MID-OHIO REGIONAL  
**MORPC**  
PLANNING COMMISSION

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## **CONSULTANT SERVICES PROGRAM: APPLICATION FOR PREQUALIFICATION FORM INSTRUCTIONS**

### **MID-OHIO REGIONAL PLANNING COMMISSION**

The Mid-Ohio Regional Planning Commission (MORPC) serves as Central Ohio's regional council and as a resource for local officials as they make decisions about economic growth, development, transportation, energy, and environmental sustainability.

MORPC works with our regional partners to ensure Central Ohio remains thriving and competitive, with improved opportunities for social and economic mobility. This includes our efforts to prioritize important infrastructure projects and advance strategic investments across the region – connecting our people and products to the world.

MORPC requests interested and qualified companies submit a Statement of Qualifications to become a Prequalified Consultant/Firm to submit proposals – and perform work – for the Consultant Services Program.

The Consultant Services Program streamlines the Request for Proposals (RFP) process for MORPC member communities by prequalifying consultants for long-range planning projects, drafting Requests for Proposals on behalf of the community's project goals, interests, and budgets, creating a central repository for long-range planning *RFPs*, conducting initial reviews of Proposal Submissions, and facilitating final presentations of proposals.

These Application for Prequalification Instructions outlines the information necessary for becoming a Consultant Services Prequalified Consultant/Firm and is available on the [Consultant Services Program](#) website. All firms who anticipate performing over 20% of a proposal's scope of services should apply for prequalification. Any firm completing over 20% of a project's budgeted hours is required to be prequalified. For any questions related to the Consultant Services Program or the Application for Prequalification, please contact [jmiller@morpc.org](mailto:jmiller@morpc.org).

The Mid-Ohio Regional Planning Commission in accordance with Title VI of the Civil Rights Act of 1964 and the related nondiscrimination statutes, hereby notifies all bidders that it will affirmatively ensure that any contract entered into pursuant to this advertisement by all companies/firms - including disadvantaged business enterprises - will be afforded full and fair opportunity to submit an Application for Prequalification, and will not be discriminated against on the grounds of race, color, national origin, sex, age, disability, low-income status, or limited English proficiency.

Small, minority-owned, or woman-owned businesses are strongly encouraged to apply.

*\*Updated: September 6, 2023*

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## **I. BACKGROUND**

Central Ohio is a region at an inflection point. With a projected population of 3.15 million residents by 2050 and recent large-scale economic development investments, Central Ohio Communities are facing unprecedented growth. The current rate of investments and growth is outpacing our communities' capacity to adequately envision – and plan for – their future. Increasing population growth can be seen through increased congestion on roadways, housing shortages, and stressed infrastructure. In order to maintain the affordable cost-of-living, efficient transportation systems, and quality municipal, township, and county services, our region's communities need to be proactive in planning for the future.

However, many of Central Ohio's communities lack the internal staff expertise or time commitments required to engage in these long-range planning efforts. The current common practice for communities to engage in these plans is to hire external private-sector consultants to complete the work through the traditional Request for Proposals (RFP) process, which includes formulating all of the requisite documentation and guidance, reviewing all proposals for conformance to the RFP guidelines and minimum qualifications, conducting finalist interviews, and negotiating final contractual details. For communities, this process is frequently time-consuming to the extent that they are forced to forestall these efforts in favor of immediate community concerns.

In response to the anticipated growth in the region and the barriers that communities face to engage in solutions, MORPC has developed a Community-Based Planning Assistance Service. One component of this service – the Consultant Services Program – is designed to lower the burden on communities and consultants when engaging in long-range planning activities.

The Consultant Services Program streamlines the RFP process for MORPC member communities by prequalifying consultants for long-range planning projects, drafting Requests for Proposals on behalf of the community's project goals, interests, and budgets, creating a central repository for long-range planning RFPs, conducting initial reviews of Proposal Submissions, facilitating final presentations of proposals, and assistance with the final consultant selection. MORPC's role in this arena will create the following benefits for communities and consultants:

- Free-up community staff time for immediate local needs by carrying the burden of ensuring all proposals received are from consultants with expertise in a specific area, drafting formal RFPs, performing initial reviews of Proposal Submissions to select the highest quality proposals for the community, and facilitating interviews with and selecting final consultants.
- Streamline the RFP response process by creating a singular repository for member RFPs, formatting all RFPs into a consistent format, prequalifying applicants in one-step to avoid duplicative efforts across Proposal Submissions, and enabling one point of contact for all questions related to any advertised RFPs.

## **II. SCOPE OF SERVICES / ELIGIBLE PROJECT TYPES**

The scope of services for individual projects will be outlined in the RFPs posted to the [program webpage](#).

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The Application for Prequalification (AP) consists of information required to prequalify consultants to submit proposals – and perform work for – long-range planning projects advertised through the Consultant Services Program. Consultants can be prequalified for all – or a subset of – eligible planning project types.

Eligible projects under the Consultant Services Program, along with the identified codes, are listed below.

Table 1: Project Type IDs and Descriptions

PROJECT TYPE ID	PROJECT TYPE DESCRIPTION
ZC	New Zoning Codes/Zoning Code Rewrites
ZC-CU	Zoning Code Chapter Updates
ZC-FB	Form-Based Zoning Codes
CP	New Comprehensive Plans
CP-UP	Comprehensive Plan - Full Update
CP-UA	Comprehensive Plan Chapter Updates/Addendums
CP-UA-D	Demographics
CP-UA-LU	Land Use
CP-UA-T	Transportation
CP-UA-H	Housing
CP-UA-NR	Natural Resources
CP-UA-OS	Open Space / Parks
CP-UP-R	Comprehensive Plan Recommendation Updates
NAP	Neighborhood / Area Plans
HAP	Housing Action Plans
ATP	Active Transportation Plans
PPA	Parking Plans / Assessments
<p><i>*When referring to project type IDs, all subsequent extensions of a project ID are included in the project ID of the overarching project type. For example, seeking prequalification for Project ID CP-UP would include all subsequent project types (e.g. CP-UP-R).</i></p>	

When selecting a Project Type for prequalification, choose the type(s) which best fits the consultant’s areas of specialization. More than one specialization may be identified, as long as the supporting documentation within the application accurately reflects the identified project types. If there are any questions regarding project types, please contact [jmiller@morpc.org](mailto:jmiller@morpc.org).

### III. APPLICATION FOR PREQUALIFICATION CONTENTS

The Application for Prequalification must address the following items. File uploads for each section within the [Application for Prequalification Form](#) are required entries for submission, and reflect the Sections outlined below.

Application Sections 1 and 2 outline information contained within the Cover Letter. Although it may be duplicative, please enter this information separately so that contact and consultant information is readily accessible.

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Section 3 of the Application for Prequalification Form provides file uploads for each of the following sections.

When uploading documents to the Application for Prequalification Form, use the following file naming convention, and remove all spaces:

**ConsultantName\_SectionLetterAndName\_YearOfPrequalification**

For example, a Planning Consultant with the name, “Community Plans” would submit Section A of their 2024 Application for Prequalification as: “CommunityPlans\_SectionACoverPage\_2024”

**SECTION A. COVER PAGE**

All Applications for Prequalification should include a cover page which identifies the following:

1. Area(s) of specialization(s) being sought through the Application for Prequalification.
2. Company name, address, and phone number of both the main company office and – if applicable – the branch office that is anticipated to perform the majority of work secured through the Consultant Services Program.

\*All cover pages should be formatted with “Application for Prequalification” as the title, and “MORPC Consultant Services Program” as the subtitle.

**SECTION B. LETTER OF INTENT (LOI) / COVER LETTER**

A letter of intent/cover letter should be included in all Applications for Prequalification. The letter of intent/cover letter should indicate the primary purpose of the application, as well as the area of specialization, the consulting firm(s) that make up the Consultant Team, and any particular area(s) of expertise. The following should be explicitly included in the LOI / Cover Letter:

1. Purpose / Intent of the Application.
2. Area of specialization(s) being sought through the Application for Prequalification.
3. Brief Summary of Application Contents (personnel experience and project history).
4. Primary Point of Contact.
  - a. Main Point of Contact’s Name and Title.
  - b. Name of Consulting Firm.
  - c. Office Address (For the office location primarily performing the work).
  - d. Telephone Number.
  - e. E-mail Address.
5. EDGE / DBE / MBE Certified Business Enterprise Information.
6. Include a statement that the applicant has sole and complete responsibility for delivery of the services for which prequalification is sought.

The Primary Point of Contact should be available to answer any clarification questions regarding the submitted Application for Prequalification or details concerning the Applicant’s relevant experience. The Primary Point of Contact will also receive all communications regarding submitted requests for assistance that fall under the categories with which the Consultant Team has been prequalified.

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The LOI / Cover Letter should be signed by someone with authorization to legally bind the Consultant/Firm and include a Statement of Acknowledgement for the application. The Statement of Acknowledgement should include the following verbiage:

*"I attest that the information provided within this Application for Prequalification for the Consultant Services Program (CSP) through the Mid-Ohio Regional Planning Commission (MORPC) is current and factual, and that the Consultant and its Team Members have the capacity to work on any projects which may be awarded as a result of MORPC's CSP".*

### **SECTION C. CONSULTANT TEAM / PERSONNEL PROFILES**

Submit a Company Profile which lists the primary personnel, their experience, and any associated qualifications. Complete the following information for all key personnel of the company who are anticipated to have significant roles in any project that may be awarded through the Consultant Services Program. The experience and qualifications for each individual should not exceed one (1) 8.5 inch by 11-inch page, utilize a font size of no larger than 12 pt and no smaller than 10 pt for all body text (excludes title and headers), and have margins no less than 0.25 inches on all sides.

1. Name & Title.
2. Relevant Work Experience.
3. Applicable Certifications/Licenses or Other Professional Qualifications\*.

\*Sample List of Potential Certifications/Licenses and Professional Qualifications:

AICP	American Institute of Certified Planners	LSS / SS	Lean Six Sigma / Six Sigma
AIA	American Institute of Architects	MBB	Master Black Belt
ASLA	American Society of Landscape Architects	BB	Black Belt
GISP	Geographic Information Systems Professional	GB	Green Belt
LEED GA	LEED Green Associate	YB	Yellow Belt
LEED AP	LEED Accredited Professional	WB	White Belt
BD+C	Building Design and Construction specialty	PMP	Project Management Professional
ID+C	Interior Design and Construction specialty	PgMP	Program Management Professional
O+M	Operations and Maintenance specialty	CEcD	Certified Economic Developer
ND	Neighborhood Development specialty	PE	Professional Engineer
Homes	Specialty for residential LEED construction	CFM	Certified Floodplain Manager

### **SECTION D. ORGANIZATIONAL CHART**

Include an organizational chart of the Applicant which shows the names and roles of all key personnel from Section C. Lines of communication between team members should be illustrated, along with the main point of contact for each team, if applicable. Use the following standard titles as appropriate to identify specific roles within the project team to create commonalities between all Prequalified Consultants.

STANDARD TITLES	TITLE DESCRIPTIONS
Consultant Team Lead*	This title should be used once for the Primary Consultant's Main Point of Contact.
Project Manager(s)*	Any member of the Consultant Team who may lead projects or proposal presentations.

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Project Administrator(s)*	Responsible for the internal management of the project. May overlap or include Consultant Team Lead or Project Manager roles.
Team Lead(s)*	Oversees or acts as the Point of Contact for a specialized subset of the Consultant Team. May most commonly be the Point of Contact for Subconsultants or specialized teams (i.e., GIS, Field Research, Data & Analytics, etc.).
Senior Level Staff Member(s)	Working staff with a supervisory role over lower-level staff. Generally responsible for performing information analysis and content writing.
Associate Level Staff Member(s)	Working staff with minimal supervisory responsibilities. Generally responsible for performing information analysis and content writing.
Intern/Assistant Level Staff Member(s)	Limited working staff with no supervisory responsibilities. Generally responsible for information/data acquisition and preliminary analysis.
Executive Assistant/Scheduler	Key staff performing supportive administrative duties and responsible for coordinating schedules/presentations/etc.
<i>*These roles must be included in all organizational charts, though multiple roles for one personnel member are permitted.</i>	

## SECTION E. EXAMPLE PROJECTS

Submit example project summaries completed by the Applicant that illustrate the capability to perform work within the desired specialization area. Examples should demonstrate both competencies in the desired area(s) of prequalification and an approach inclusive of teamwork, collaboration, public participation elements (if applicable), and innovative techniques or results. **Each example project should be no longer than 1 page, with no more than 2 example projects per project type.** The example project page should not exceed one (1) 8.5 inch by 11-inch page, utilize a font size of no larger than 12 pt and no smaller than 10 pt for all body text (excludes title and headers), and have margins no less than 0.25 inches on each size.

Each project summary should contain the following information:

1. Project Example Number: e.g., Project Example 1, Project Example 2, etc.
2. Project Title, Client, Location, and Year Completed.
3. Project Description: Include (where applicable):
  - a. The project's scope of work.
  - b. Deliverables.
  - c. Any notable results, recommendations, and/or conclusions.
  - d. Benefits to the project's client.
  - e. Other details pertinent to understanding the methods and roles of the Applicant in the project.
4. Key Team Members: Include the involvement of any Consultant Team Members from Section C that contributed to the project.
5. Additional Project Information Include any of the following if it applies directly to the example project (if applicable):
  - a. Letters of Reference or Evaluation.
  - b. Awards or Certifications.
  - c. Imagery (photos, charts, graphs, etc.).



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## SECTION F. GENERAL HOURLY FEE STRUCTURES

Include a fee structure table which identifies the roles of key personnel outlined in Section D, and the associated hourly billing rates. This table is for context and future reference only and will not impact the status of Prequalification. Any proposals submitted through the Consultant Services Program during the calendar year of Prequalification must utilize this submitted Hourly Fee Structure, unless an amendment is provided to MORPC prior to submitting a Proposal.

## SECTION G. INSURANCE INFORMATION

Provide copies of the following documentation as an appendix/supplement to the Application for Prequalification.

1. Copy of current Ohio Bureau of Workers' Compensation Certificate of Premium Payment.
2. Copy of Certificate of Liability Insurance, or a statement that the company will obtain insurance before submitting any Proposals to projects solicited through the Consultant Services Program.
3. Statement that the company will furnish to MORPC a copy of the Certificate of Liability Insurance naming MORPC and Program Funders (as required/requested) as additional insured.

## IV. SELECTION PROCESS

Contractor qualifications will be reviewed and assessed to determine if the submitter meets – or is capable of meeting – the contracting requirements for the Consultant Services Program. If there are areas of deficiency (for example, proficiency in a given area is not clearly demonstrated), consideration will be given if the submitter demonstrates how they will meet the requirement.

MORPC will prequalify all companies/firms who submit Applications for Prequalification that demonstrate sufficient proficiency in the applicable Project Types. Proficiency will be determined by scoring in three categories and determined by meeting a minimum scoring total / aggregate score of 7.5.

The Prequalification Evaluation Criteria are as follows, including sample scoring to illustrate the effects of the weighting factors:

CONSULTANT SERVICES: SAMPLE PREQUALIFICATION EVALUATION				
FACTOR	DESCRIPTION	WEIGHT (%)	SAMPLE SCORE	WEIGHTED SCORE
<b>EXPERTISE OF FIRM / CONSULTANT PERSONNEL &amp; MANAGEMENT</b>				
Qualifications and experience of proposed personnel	Did the delineated Team Members exhibit the requisite knowledge and work history to sufficiently contribute in the requested Project Type?	100%	9	8.5
<i>Project Management</i>	<i>Related to Project Management.</i>	<i>20%</i>	<i>9</i>	<i>1.80</i>
<i>Team Leads</i>	<i>Related to Team Leads.</i>	<i>30%</i>	<i>9</i>	<i>2.70</i>
<i>Other Staff</i>	<i>Related to all other Staff.</i>	<i>50%</i>	<i>8</i>	<i>4.00</i>



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<b>EXPERTISE OF FIRM / CONSULTANT PERSONNEL &amp; MANAGEMENT TOTAL</b>			<b>9</b>	<b>8.50</b>
<b>CONTRIBUTION TO AGGREGATE SCORE</b>		<b>40%</b>	<b>-</b>	<b>3.4</b>
<b>PAST PROJECTS &amp; EXPERIENCE</b>				
Example projects representative of Project Type	Did the submitted example projects accurately reflect the requested Project Type?	40%	9	3.60
Deliverables and results relate to Project Goals	Did the deliverables and/or results of the project relate to the intended Project Goals?	30%	8	2.40
Quality and quantity of services rendered	Were the deliverables and/or results sufficient in expected quality, and were the deliverables ample enough to serve the Project Goals?	30%	9	2.70
<b>PAST PROJECTS &amp; EXPERIENCE TOTAL</b>			<b>26</b>	<b>8.70</b>
<b>CONTRIBUTION TO AGGREGATE SCORE</b>		<b>30%</b>	<b>-</b>	<b>2.61</b>
<b>KNOWLEDGE OF PROGRAM AREAS</b>				
Clarity and organization in concept development	Did the Applicant show a clearly organized solution to their work relative to the requested Project Type?	25%	9	2.25
Approach to study (including the ability to derive creative solutions and clear descriptions of the elements of the work plan)	Did the Application for Prequalification illustrate the Applicant's ability to logically and appropriately approach a Project in the requested Project Type, including knowledge of emerging techniques and solutions?	25%	8	2.00
Familiarity with the regional economy, culture, and environment	Has the Applicant shown a familiarity with the local issues, concerns, and characteristics of Central Ohio?	25%	7	1.75
Capacity to locally coordinate and administer the project	Did the Applicant have a sufficient enough local presence to coordinate and administer projects that may be awarded?	25%	8	2.00
<b>KNOWLEDGE OF PROGRAM AREAS TOTAL</b>			<b>32</b>	<b>8.00</b>
<b>CONTRIBUTION TO AGGREGATE SCORE</b>		<b>30%</b>	<b>-</b>	<b>2.40</b>
<b>AGGREGATE SCORE</b>		<b>100%</b>	<b>-</b>	<b>8.41</b>

Each factor is scored on a scale of 1 to 10. The weighted percentages of each individual factor represents that factor's relative weight towards the total of that category, while the weighted percentages of the categories' total represents the relative weight towards the total scoring. For example, "Familiarity with the regional economy, culture, and environment" represents 25% of the score for the "Knowledge of Program Areas" category, while the "Knowledge of Program Areas" category represents 30% of the total score.

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## V. SCHEDULE & SUBMISSION FORMATS

Please refer to the dates table below for information regarding submission windows, deadlines, and other pertinent timelines relating the initial Prequalification Phase, as well as Prequalification for Rounds 1 through 4 in 2024.

PREQUALIFICATION TIMELINE	2023	2024
	PILOT ROUND	ROUNDS 1 THROUGH 4
Notice for Prequalification or Renewal	September 18th	December 22nd (2023)
Information Meeting for Firms / Consultants	*Recorded presentations will be uploaded to the Program's webpage	January 5th
Prequalification Application Window Opening	September 18th	January 8th
Prequalification Application Window Closing	October 13th	February 2nd
Internal Review of Prequalification Requests	October 10th to October 13th	February 5th to February 9th
Notification of Prequalified Firms	October 13th	February 9th

Please submit all Applications for Prequalification through the [Application for Prequalification Form](#) found on the [Consultant Services Program](#) webpage by the deadlines identified above. The Application for Prequalification Form contains individual file uploads for each section, so each section should consist of one (1) PDF – with the total size of all attachments limited to 25 MB. To promote sustainable practices, MORPC will only accept electronic Applications for Prequalification.

Interested parties may submit an Application for Prequalification at any time during the above applicable time periods. Early submissions are encouraged so that applicants may have adequate time to address any potential comments ahead of the closing date. In order to allow time for MORPC to review and prequalify all eligible Applicants, only those Applications for Prequalification received during this window will be eligible for inclusion in the CSP.

## VI. TERMS & CONDITIONS

The submitter agrees that it will not discriminate against any potential consultant, Agency, community, employee, applicant for employment, or sub-contractor and that it will take affirmative action to ensure that employees, potential consultants, applicants and sub-contractors are treated equally during employment without regard to race, color, sex, gender identification, creed, religion, ancestry, national origin, sexual orientation, disability, genetic information, age, marital/familial status, military status (past, present, or future), limited English proficiency, or status with regard to public assistance.

All proposals submitted in response to RFPs advertised through the Consultant Services Program are encouraged to include Minority Business Enterprises (MBE), Disadvantaged Business Enterprises (DBE), or

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Encouraging Diversity, Growth & Equity (EDGE) partners. A five percent (5%) minority business enterprise (MBE) goal has been established for the program, consistent with MORPC's Diversity and Inclusion Plan. Agencies and prequalified applicants are strongly encouraged to meet or exceed this goal in any submitted proposals. It is preferred that MBE firms are certified as a minority business enterprise by the State of Ohio, the City of Columbus, or other similar certifying entity. MORPC will expect the selected proposer to meet the MBE percentage included in their contract and will require ongoing reporting of this percentage during the contract life. MORPC will also include MBE prompt payment requirements in all contracts.

MORPC retains the right to modify and change the requirements of this Application for Prequalification from time to time. In such events, this Application for Prequalification will be replaced with an updated version.

MORPC reserves the right to accept or reject any or all Requests for Assistance, Applications for Prequalification, and Proposal Submissions for any reason.

MORPC shall not be liable for any costs incurred by the submitter of any Request for Assistance, Application for Prequalification, or Proposal Submission as a result of the CSP, or any costs incurred in connection with any discussions, correspondence or attendance at interviews or negotiation sessions.

All materials submitted in response to Notices of Request for Assistance, Application for Prequalification, or RFP shall become the property of MORPC and may be returned only at MORPC's option.

All materials received shall be considered public information and shall be open to public inspection.

### ***UNRESOLVED FINDING FOR RECOVERY***

The selected consultant affirmatively represents and warrants to MORPC that it is not subject to a finding for recovery under ORC 9.24 or that it has taken appropriate remedial steps required under ORC 9.24 or otherwise qualifies under that section. The consultant agrees that if this representation or warranty is deemed to be false, the agreement shall be void ab initio as between the parties to this agreement, and any funds paid by MORPC to the consultant hereunder shall be repaid to MORPC immediately, or an action for recovery may be commenced immediately by MORPC for recovery of said funds.

### ***COVENANTS OF CONSULTANT***

The selected consultant affirmatively represents and warrants to MORPC that it is not subject to a finding for recovery under ORC 9.24 or that it has taken appropriate remedial steps required under ORC 9.24 or otherwise qualifies under that section. The consultant agrees that if this representation or warranty is deemed to be false, the agreement shall be void ab initio as between the parties to this agreement, and any funds paid by MORPC to the consultant hereunder shall be repaid to MORPC immediately, or an action for recovery may be commenced immediately by MORPC for recovery of said funds.

The consultant will be required to covenant and warrant the following:

1. Consultant is not debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in any contract, supported in whole or in part by the funding sources for this project;
2. The Consultant has not - within a three (3) year period - had one or more public transactions terminated for cause or default; and,

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3. The Consultant will comply with the provisions of Section 1352, Title 31 of the U.S. Code, which prohibits the use of federal funds to lobby any official or employee of any federal agency, or member or employee of Congress; and to disclose any lobbying activities in connection with federal funds.