CONSULTANT SERVICES PROGRAM:
# REQUEST FOR ASSISTANCE FORM INSTRUCTIONS

### MID-OHIO REGIONAL PLANNING COMMISSION

The Mid-Ohio Regional Planning Commission (MORPC) is soliciting Requests for Assistance through the Consultant Services Program. The Consultant Services Program (CSP) is a program intended to assist MORPC's member communities with the process of engaging in long-range planning activities. Through the CSP, MORPC streamlines the RFP process by prequalifying consultants for long-range planning projects, drafting *Requests for Proposals* on behalf of the member 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 drafting/managing the project's contracts; including facilitating payments and invoicing.

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.

These Request for Assistance Instructions provide a template for communities to use to submit eligible projects for inclusion in the CSP. For any questions related to the Consultant Services Program or the Request for Assistance Form, please contact consultantservices@morpc.org.

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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 so that – as a region – we can **grow better as we grow bigger**.

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 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.  APPLICANT ELIGIBILITY

Eligible applicants for the Consultant Services Program include MORPC's Member Communities. If you are unsure of your communities' status as a member community, please contact Eileen Leuby, Member Services Officer (eleuby@morpc.org).

## III.  PROJECT TYPE ELIGIBILITY

Projects that are eligible for inclusion in MORPC's Consultant Services Program are currently limited to long-range planning activities relating to Zoning Codes, Comprehensive Plans, and various other project types.

Eligible project types 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-UP-R* | *Comprehensive Plan Recommendation Updates* |
| 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* |
| ED | Economic Development Activities |
| PE | Public Engagement |
| NAP | Neighborhood / Area Plans |
| HAP | Housing Action Plans |
| ATP | Active Transportation Plans |
| PPA | Parking Plans / Assessments |
| *\*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 (CP-UP-R).* | |

When selecting a Project Type, choose the type which best fits the specific scope of work being requested. If there are any questions regarding project type eligibility, please contact consultantservices@morpc.org.

## IV.  REQUEST FOR ASSISTANCE CONTENTS

Submitted Requests for Assistance (RA) should include the following sections/elements:

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## SECTION 1. COMMUNITY INFORMATION

The following information will be needed with regard to the community requesting assistance.

1. Jurisdiction / Community Name
2. Jurisdiction / Community Type
3. Jurisdiction's Member Status with MORPC

## SECTION 2. POINT OF CONTACT INFORMATION

Please provide contact information for the main person who will be responsible for managing the request.

4. First & Last Name
5. Position / Title
6. Department
7. Phone Number
8. Email

## SECTION 3. PROJECT INFORMATION

This section relates to information about the *Request for Assistance* and includes an opportunity to upload any pertinent documentation.

9. Project Name
   What is the name of the Project for which assistance is being requested.

10. Project Background
    A history and relevant background of the project should be included to provide significant and meaningful context for the Prequalified Consultants to respond to. The background should include a summarization of how the need for the project was realized, and any pertinent steps or history of how the decision to pursue the project was actualized.

11. Project Purpose
    The Agency should also include a detailed outline of the project's purpose. This section should include details on the desired outcomes and goals, any topics or subjects of particular importance/relevance, target populations or geographical areas (if applicable), and any other information that may provide additional insight to Prequalified Consultants on the desired outcomes that will arise from completion of the project.

12. Scope of Services
    The Scope of Services should contain as much detail as possible. Once a final consultant has been selected and the Agency enters contract negotiations, further details can be discussed with the consultant in order to determine finalized timelines and deliverable products. The scope and deliverables detailed in this section will allow the consultant to tailor Proposal Submissions around the elements identified in this section to ensure that the Agencies primary goals are being met.

Being as specific as possible, provide a list – and description of – any required components that may be known at this point for a particular project. For example, if the project requires an existing conditions analysis and the agency would like updated population projections, explicitly include that basic component to ensure that the desired work is included in any proposal submitted for the project. Other potential items that might be included in this section are:

1. Public participation activities
   a. Charettes
   b. Public Meeting Presentations
   c. Surveys
2. Analyses potentially outside traditional workflows
   a. Population Projections
   b. Gap Analyses
   c. Feasibility Studies
3. Logistical requirements of the consultant
   a. Stakeholder Meetings
   b. Site Visits
   c. Check-In Meetings

This element is important for providing relative context of the project to the consultant/consultant teams who may be submitting proposals for the project. A detailed component/aspect section will ensure that proposals are suited to the needs and desires of the community and will result in stronger proposals and project results.

Note: A full and complete Scope of Services is not required at this point. Further refinement of the final Scope of Services will be completed during a Scoping Meeting with the consultant once a final consultant or consultant team for the project is selected.

13. Project Deliverables
    Include an itemization of the required deliverables for the requested project.

14. Project Milestones / Timeline
    Include any specific dates or timeframes that the project should adhere to. Potential dates and timeframes could potentially include, but may not be limited to:

    - Project start date (January 1st unless otherwise noted).
    - Overall project duration.
    - Project close-out date.
    - Duration of any specific project phases.
    - Dates for submittal of any deliverables.
    - Public participation dates (workshops / site visits / etc.)

15. Anticipated Project Budget
    To ensure proposals received are accurate regarding the methods and scope, Agencies should include as much detail concerning the anticipated as practicable. More detail included in this section will result in higher quality Proposal Submissions.

Anticipated project budget details should include a target budget total, a flexible range that the Agency is comfortable operating within, and – if desired – recommended breakdowns of how the budget should ultimately be allocated in relation to the project scope. The table below outlines some of the information that should be contained in this section to generate quality and accurate Proposal Submissions.

Table 2: Sample Project Budget Detail Table

| ANTICIPATED PROJECT BUDGET DETAILS | |
|---|---|
| *Anticipated Budget Range* | *$80,000 to $110,000* |
| *Target Budget* | *$95,000* |
| *Proposed Budget Allocations* | |
| *Public Participation* | *20%* |
| *Project Management* | *10%* |
| *Data Collection* | *40%* |
| *Report Writing* | *30%* |

The anticipated project budget details should also include any Encouraging Diversity, Growth & Equity (EDGE) / Minority Business Enterprise (MBE) / Disadvantaged Business Enterprise (DBE) requirements that may be imposed as a result of the project's funding source. Consistent with MORPC's Diversity and Inclusion Plan, a five percent (5%) minority business enterprise (MBE) goal has been established for the program.

Additionally, all projects which utilize State or Federal dollars may be subject to additional minimum EDGE / MBE / DBE requirements. Please check the project's funding sources for any applicable requirements and include those details within this section.

Note: Communicating and fulfilling EDGE / MBE / DBE requirements with the originating funding sources is the responsibility of the Agency. As a facilitating entity, MORPC is not responsible / liable for determining a funding source's requirements or the submittal of any verifications of the same.

16. Additional Information
Outline any other additional information that may be necessary to include and/or emphasize within an RFP for your project.

If the Agency has specific criterion that they wish to be included in the review and scoring of Proposal Submissions, include those items here so that consultant finalists best represent the areas of most importance.

Unless otherwise delineated, MORPC will review and score all Proposal Submissions for the submitted project according to three main categories: General Quality & Adequacy of Response; Organization, Personnel, Experience & Project Management; Technical Approach & Work Plan, and Cost / Budget.

17. Document Upload
Supplementary documentation is not necessary, but may help communicate certain project requirements, details, or other important information necessary to understanding the community's desired outcomes.

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Please use the following file naming convention for any uploaded documents, and eliminate all spaces:

COMMUNITY NAME_DOCUMENT NAME_DATE (as YYYYMMDD)

For example, a community named Ohiosville submitting an application on January 30th, 2024 would submit a summary of the project (if applicable) as:

**Ohiosville_ProjectSummary_20240130**

## V. SCHEDULE & SUBMISSION FORMATS

Currently MORPC is accepting Requests for Assistance on a rolling basis. Therefore, there are no specific deadlines related to assistance requests.

Please submit all Requests for Assistance through the *Requests for Assistance Form* located on the Consultant Services Program webpage by the deadlines identified above. To promote sustainable practices, MORPC will only accept electronic Requests for Assistance.

Interested parties may submit their RA at any time. If the community is working with a specific timeline in mind, MORPC encourages submitting requests earlier so that there may be adequate time to address any potential comments/suggestions.

## VI. TERMS & CONDITIONS

The submitter agrees that it will not discriminate against any potential consultants, agencies, communities, employees, applicants for employment, or sub-contractors 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 advertised through the Consultant Services Program may include MBE, DBE, or EDGE requirements. 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 consultant / consultant team 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.

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**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.

By submitting a Request for Assistance, the Agency confirms that – to the best of their knowledge:

1.  The Agency is prepared to move forward with contract negotiations.

2.  The Agency has financing secured with which to complete the proposed project. And,

3.  The submitted Request for Assistance completely and accurately represents the goals of the project and the interests of the Agency and community, and no information which would reasonably be deemed important to the project has been withheld.