



**REQUEST FOR QUALIFICATIONS:
RETAINER AGREEMENT FOR CONSULTING SERVICES**

The purpose of this Request for Qualifications is to obtain an annual retainer agreement for professional consulting services.

Submit Qualifications to:

Loudan Klein, Director of Community and Economic Development, Copley Township

Submission Deadline Friday, September 23, 2022 4:00PM EST

Questions with regard to submissions, process or qualifications can be directed to: Loudan Klein,
Director of Community and Economic Development, Copley Township.

Phone – 330.666.0108

Email – lklein@copley.oh.us

INTRODUCTION

Copley Township is accepting qualifications from qualified firms to provide professional consulting services upon request from Copley Township on an “as needed” basis. The services requested will be tied to the advancement of capital projects outlined by the Board of Trustees. The Township will enter into an agreement with the individuals or firms selected to provide these services. All interested parties are required to submit qualifications in accordance with the conditions and dates outlined in this Request for Qualifications (RFQ).

BACKGROUND

Copley Township maintains several different types of annual, professional retainer agreements for use on an “as needed” basis. The retainer agreement allows the Township to request services of the retained Consultant on an individual project basis as the need arises. Prior to any work completed under the retainer agreement a specific service request must be issued for each project, specifically delineating the requested services, with fees for said services based upon rates identified in the retainer agreement and in conjunction with a jointly agreeable, negotiated maximum fee for said services. Should the Township fail to successfully negotiate an acceptable maximum fee for services for a specific project with the Consultant involved, the Township reserves the right to seek and retain said services through other means or firms.

SCOPE OF SERVICES (RETAINER CONSULTING SERVICES) (RFQ)

The proposed scope of services would include, but would not be limited to the following:

1. Provide Consulting and/or Professional services upon the request of the Township for projects related to the Township’s properties and/or structures.
2. Requested services may involve any one, or a combination of, the following Professional Service areas:
 - a. Review the Township’s requested project and/or task to be accomplished and provide preliminary consultation, research and evaluation of same;
 - b. Assist the Township Administrator and Department Heads with presentations and/or recommendations to the Township staff, committees, boards, or the Board of Trustees;
 - c. Provide concepts, associated engineering, drafting, cost estimates and/or specifications necessary to bid and accomplish projects in support of the Township;
 - d. Professional services during the bid process and project construction.

ASSUMPTIONS (RFQ)

With Board of Trustees approval, a successful Consultant shall be awarded an annual retainer agreement for consulting services. At the discretion of the Township, deliverables shall be provided to the Township in the form of hard copies as well as electronic copies for all specifications, reports, and all documents, including but not limited to: plans, analysis and specifications, and any necessary technical data.

The Township Administrator, or his/her designee, will be the main point of contact to facilitate the various services requested.

The Township will screen and evaluate proposals primarily on the basis of demonstrated professional expertise. The Consultant shall be chosen on the basis of the firm's demonstrated competence, availability, abilities and overall professional qualifications. The Township reserves the right to enter into agreements with multiple consultants.

Requests for Information (RFI) must be addressed in writing and directed to the contact person specified on the front page of this RFQ. An RFI sent to any other contact person may be subject to delay or may not be received at all. Each RFI must be received at least (72) hours prior to the stated proposal submission deadline.

If the Township determines that a response to an RFI is necessary for clarification, then a response will be issued in writing as an addendum for the benefit of all interested consultants. The Township will not respond to an RFI received less than (72) hours prior to the proposal submission deadline, as this does not provide prospective consultants enough time to make modifications to their qualifications. The Township will not respond to an RFI with verbal clarification; all Township responses to an RFI shall be in writing.

INFORMATION REQUESTED (RFQ)

The Township is seeking a qualified consultant that demonstrates extensive knowledge and experience in providing professional consulting services related to public infrastructure. Each proposal must contain a statement of qualifications that includes the following information:

1. General Information – Provide the name, address, and telephone number of the individual or firm, as well as the name of the person authorized to negotiate contract terms and make binding agreements. Include the professional qualifications necessary for completing the work. The professional qualifications necessary for completing the work refers to the staff members that will be working on the potential projects. Please provide a list of qualified professionals;
2. Background – Provide background and history of the company's consulting experience which specifically addresses the organization's knowledge and experience. Use of a resume attachment is acceptable;
3. Services and History– Provide a list of available services as well as a listing and description of work completed. The Township is requesting the prospective consultant to provide a description of work for each available service. The description of work shall include previous completed work as well;
4. Response Time – Description of individual or firm's resources that allow for a timely delivery of services, including the names and qualifications of the firm's staff that will be working with the Township;
5. Fees – Provide a fee schedule. Each proposal shall provide hourly rates of staff. This information will not be used in the technical evaluation of qualifications. It will be used as a basis of compensation for the Retainer Agreement.
6. Public Agencies – Include narrative description of experience with public agencies, if any;
7. References – Provide three or more references that can supply information on the quality of the services provided by your firm during the past two years. In addition, include descriptions of three samples of work (i.e. projects) that contain, at a minimum: the name or title of the

project, the location(s) of the project, the name of the contracting agency, the total project budget, and a brief project description. The Township is not requesting copies of any deliverables provided as part of the previous work; rather, just a summary of the work performed. Copies of the actual deliverables may be provided, as long as they are included in an appendix. The three references may or may not be affiliated with the three samples of work provided.

QUALIFICATIONS CONTENT (RFQ)

The Township requires each Consultant to submit qualifications clearly addressing all of the requirements outlined in the RFQ. The qualifications shall be limited to 30 pages (not including a cover page) and must include a minimum of three recent or current client references, which include the address and telephone number of each reference. Resumes and a company qualification brochure may be added to the 30-page proposal, provided they are located in an Appendix at the back of the qualifications. Material contained in appendices will not be used for evaluation purposes in the scoring of proposals. Though the Consultant may submit qualifications organized according to their preference, it must be clear and concise. Should a consultant have concerns about meeting any requirements of this RFQ they may include a clearly labeled subsection within an appendix with individual statements specifically identifying their concerns and exceptions. If no exceptions are stated, the Township shall assume the consultant understands all of the requirements of the RFQ.

CONTRACTUAL REQUIREMENTS / RETAINER AGREEMENT (RFQ)

A Retainer Agreement for Consulting Services between the Township and Consultant will serve as basic document, in conjunction with a Service Request issued by the Township, for each requested service for the period of November 1, 2022, through November 1, 2023 (tentative). A draft agreement will be prepared by Township counsel for the selected firms' review.

QUALIFICATION SUBMISSION (RFQ)

The consultant shall provide the information requested within the RFQ. The consultant's qualifications to this RFQ consists of the consultant's response to the information requested.

Qualifications should provide a straight forward and concise presentation adequate to satisfy the requirements of this RFQ. Consultants may attach relevant information and documentation not specifically requested. The consultant shall hand-deliver or mail/e-mail their proposal to the Township at the address listed on the front page of the RFQ so that qualifications are received no later than the date and time specified. This time and date is fixed and extensions will not be granted. The Township does not recognize the U.S. Postal Service, its postmarks or any other organization as its agent for purposes of receiving qualifications. All qualifications received after the deadline will be rejected.

The consultant shall provide three (3) printed, bound copies of their qualifications OR one electronic copy (in PDF format) of their qualifications via email or USB flash drive to be considered responsive. All materials submitted will become property of the Township and returned only at the Township's option.

QUALIFICATION SELECTION (RFQ)

Qualifications will be reviewed by Township staff and evaluated to determine which qualification(s) best meet the criteria of the RFQ. The final selection will be based on completeness, experience with agencies, technical merit, cost competitiveness and time to perform. It is the Township's intention to select at least one firm that has sufficient expertise to handle the variety of projects the Township undertakes thereby minimizing the involvement of other firms. However, the Township reserves the right to select and contract with more than a single firm for the specified services.

The Township reserves the right, without qualification, to:

1. Reject all qualifications.
2. Exercise discretion and apply its judgment with respect to any qualifications submitted
3. Select qualifications which qualify based on the following factors (50 points max):
 - a. Understanding of the work to be done (12 pts),
 - b. Experience with similar kinds of work (12 pts),
 - c. Quality of staff for work to be done (7 pts),
 - d. Capability of developing innovative or advanced techniques (5 pts),
 - e. Familiarity with county, state and federal requirements (5 pts),
 - f. Demonstrated technical ability (5 pts),
 - g. Financial responsibility (4 pts),
4. Township staff will review and rank all qualifications received from consultants and recommend the consultant(s) to receive an annual retainer agreement for the work type specified within this RFQ.

A Township contract for annual consultant services will be brought to the Board of Trustees for its approval. Township staff shall notify the selected Consultant(s) of the final approval of the contract by the Board of Trustees. Once submitted all qualifications become public records and subject to disclosure, either in part or in whole, under Public Records Policy.

SELECTION INTERVIEWS (RFQ)

The Township reserves the right to hold selection interviews with any consultant submitting qualifications under this solicitation. These interviews will be held solely at the discretion of the Township and after the qualification scoring process. The intent of the Township is to hold interviews only with top-scoring consultants based on the qualification selection process. The interviews would be attended by representatives of the Township as well as the consultant's designated contact person in charge of any project solicited under the agreement. The selection interview will be used to gain further insight into the consultant's capabilities for the purpose of making a selection recommendation.

ANTICIPATED SCHEDULE OF AWARD (RFQ)

Staff anticipates scoring written qualifications and conducting interviews (if needed) in October, and providing recommendations to the Board of Trustees for consideration of award at the regularly scheduled Township trustee meetings in November.