

**Central Pines Regional Council**

**REQUEST for LETTERS of INTEREST (RFLOI)**

**DCHC MPO Strategic Plan and Organization Assessment**

**TITLE:** DCHC MPO Strategic Plan and Organization Assessment  
**ISSUE DATE:** June 19, 2024  
**SUBMITTAL DEADLINE:** July 8, 2024  
**ISSUING AGENCY:** Central Pines Regional Council (CPRC)

**I. SYNOPSIS**

SUBCONSULTANTS ARE PERMITTED UNDER THIS CONTRACT.

This contract shall be partially reimbursed with Federal-aid funding through the North Carolina Department of Transportation (hereinafter referred to as the Department). The solicitation, selection, and negotiation of a contract shall be conducted in accordance with all Department requirements and guidelines.

The primary and/or subconsultant firm(s) shall be pre-qualified by the Department to perform any of the [Discipline Codes](#) listed below for Central Pines Regional Council:

- Strategic Planning – 226

**WORK CODES for each primary and/or subconsultant firm(s) SHALL be listed on the respective RS-2 FORMS (see section 'SUBMITTAL REQUIREMENTS').**

This RFLOI is to solicit responses (LETTERS of INTEREST, or LOIs) from qualified firms to provide professional consulting services to the Durham-Chapel Hill-Carrboro Metropolitan Planning Organization (DCHC MPO) for the Central Pines Regional Council.

**II. PROPOSED CONTRACT SCOPE SUMMARY**

The Durham-Chapel Hill-Carrboro Metropolitan Planning Organization (DCHC) the "Organization" is seeking strategic planning services to guide the development of a strategic plan.

- A. Develop a strategic plan.
  - i. Integrate the Organization's values and the Long-Range Plan objectives.
  - ii. Determine a structure that links organization activities to the strategic plan.
  - iii. Identify areas of focus and priorities for DCHC.
  - iv. Establish operational improvements necessary to advance the strategic plan.

Following the development of a Strategic Plan the Organization needs to understand how to best support the work and its resources to do so. DCHC desires to understand the relationships between its short- and medium-term work programs and staffing needs.

- B. Conduct an organizational assessment.
  - i. Identify ways to enhance the organization's effectiveness, efficiency, resiliency, and adaptability.

- ii. Identify potential staffing needs, staff restructuring, and related actions to define and deliver services to members and comply with organizational commitments.

### **III. BACKGROUND**

The Organization examined governance improvements and received a completed study document in spring 2022. Resulting actions included relocating operations from the City of Durham to the Central Pines Regional Council. Following this relocation, the Organization desires guidance for future operations, including defining innovative ways expressing that leadership.

### **IV. PROPOSED BUDGET**

The project budget must not exceed \$80,000.

### **V. CLIENT PROJECT MANAGERS**

Doug Plachcinski, AICP, PCP, Executive Director, is the designated project manager.

### **VI. ELECTRONIC LOI REQUIREMENTS**

Electronic LOIs should be submitted in .pdf format.

**LOIs SHALL be received electronically no later than 2:00 p.m. on July 8, 2024.**

**The addresses for electronic deliveries are:**

- [Doug.Plachcinski@dchcmppo.org](mailto:Doug.Plachcinski@dchcmppo.org)

Please provide zipped files or a link to download qualifications document if over 10MB.

**LOIs received after this deadline will not be considered.**

Except as provided below any firm wishing to be considered must be properly registered with the Office of the Secretary of State and with the North Carolina Board of Examiners for Engineers and Surveyors. Any firm proposing to use corporate subsidiaries or subcontractors must include a statement that these companies are properly registered with the North Carolina Board of Examiners for Engineers and Surveyors and/or the NC Board for Licensing of Geologists. The Engineers performing the work and in responsible charge of the work must be registered Professional Engineers in the State of North Carolina and must have a good ethical and professional standing. It will be the responsibility of the selected private firm to verify the registration of any corporate subsidiary or subcontractor prior to submitting a Letter of Interest. Firms which are not providing engineering services need not be registered with the North Carolina Board of Examiners for Engineers and Surveyors. Some of the services being solicited may not require a license. It is the responsibility of each firm to adhere to all State of North Carolina laws.

The firm must have the financial ability to undertake the work and assume the liability. The selected firm(s) will be required to furnish proof of Professional Liability insurance coverage in the minimum amount of \$1,000,000.00. The firm(s) must have an adequate accounting system to identify costs chargeable to the project.

**VII. PROJECT TASKS AND ANTICIPATED SCHEDULE**

<b>Project Phase</b>	<b>Consultant Tasks and Outcomes</b>
1 – Project initiation and staff meeting	Consultant to meet with staff, ask questions, review the project study area(s) and expectations.
2 – Engagement with MPO Technical Committee and Board	Consultant to hold a project kickoff meeting in consultation with staff. Consultant should use the kickoff meeting as an opportunity to collect feedback with stakeholders via an engagement activity.  MPO Board Member Retreat to identify 3-7 key initiatives for the MPO to focus on over the strategic plan's horizon.
3 – MPO Staff Retreat	Initial Draft review including additional programmatic elements necessary in the 2025-2026 Unified Planning Work Program.  MPO staff retreat to calibrate ideas and delivery systems.
4 – Finalize Strategic Plan	
5 – Organizational Assessment Background Research	Research comparable organizations and benchmarking reports and provide key information regarding staffing levels, organization structures, and executive director performance evaluation.
6 – Document Current Organization Operations	Analyze how the staff is currently organized (organizational charts, job descriptions, LPA agreement, use of consultants, etc.).
7 – Peer Agency Interviews	Consultant will interview up to five (5) peer agency interviews for operational and work plan insights in addition to benchmarking insight.
8 – Prepare Draft Report	Consultant will prepare draft organizational assessment report including, but not limited to: <ul style="list-style-type: none"> <li>• Benchmarking</li> <li>• Current and Planned Staff Resources</li> <li>• Experience/Types of Talent</li> <li>• Staff Functional Structure</li> <li>• Executive Director Evaluation Structure</li> <li>• Multi-year work program prospectus</li> </ul>
9 – Final Report Presentation	MPO Board Adopts Organization Assessment Report.

**VIII. PROPOSED CONTRACT TIME: Approximately eight (8) months.****IX. PROPOSED CONTRACT PAYMENT TYPE: Lump Sum****X. SUBMITTAL REQUIREMENTS**

The LOI should be addressed to **Doug Plachcinski, DCHC MPO Executive Director**. The subject line must be **“DCHC MPO Strategic Plan and Organization Assessment”**. The LOI submittal must include the name, address, telephone number, and e-mail address of the prime consultant’s contact person for this RFLOI.

All LOIs are limited to fifteen (15) pages (resumes and RS-2 forms are not included in the page count) inclusive of the cover sheet. LOIs containing more than fifteen (15) pages will not be considered. ***One (1) electronic copy of the LOI should be submitted.***

The LOI must also include the information outlined below in the order outlined below:

- A. Cover letter (1 page maximum)
- B. Table of Contents
- C. List of available services
- D. Project team, including roles and responsibilities (include subcontractors)
- E. Examples of comparable projects the firm has completed.
- F. Detailed project approach, including public outreach methods.
- G. Project schedule showing milestones and deliverables.
- H. Any other relevant information deemed necessary (e.g., resumes, professional references)
- I. CONSULTANT CERTIFICATION Form RS-2

Completed Form RS-2 forms SHALL be submitted with the firm’s letter of interest. This section is limited to the number of pages required to provide the requested information.

Submit completed and signed RS-2 forms for the following:

**1. Prime Consultant firm**

[Prime Consultant Form RS-2](#)

**2. ANY/ALL Subconsultant firms**

[Subconsultant Form RS-2](#)

In the event the firm has no subconsultant, it is required that this be indicated on the Subconsultant Form RS-2 by entering the word “None” or the number “ZERO” and signing the form.

**Firms submitting LOIs are encouraged to carefully check them for conformance to the requirements stated above. If LOIs do not meet ALL of these requirements they will be disqualified. No exception will be granted.**

**XI. SELECTION PROCESS**

Following is a general description of the selection process:

- A. The Selection Committee will review all qualifying LOI submittals.
- B. The Selection Committee MAY, at the MPO’s discretion, shortlist a minimum of three (3) firms to be interviewed. IF APPLICABLE, dates of shortlisting and dates for interviews are shown in the section SUBMISSION SCHEDULE AND KEY DATES at the end of this RFLOI.
- C. In order to be considered for selection, consultants must submit a complete response to this RFLOI prior to the specified deadlines. Failure to submit all information in a timely manner will result in disqualification.

## **XII. SELECTION CRITERIA**

**All prequalified firms who submit responsive letters of interest will be considered.**

In selecting a firm/team, the selection committee will take into consideration qualification information including such factors as:

**A. Quality of Submission – 30%**

The submission should be complete, organized, and concise. It should clearly demonstrate the consulting firm's understanding of the subject and scope.

**B. Experience & Qualifications – 30%**

The submission should illustrate the experience and skills of the primary consulting firm, subcontractors (if any), and project team.

**C. Logic – 40%**

The proposal should be reasonable, evidence-based, and achievable in the allotted timeframe.

## **XIII. TITLE VI NONDISCRIMINATION NOTIFICATION**

CPRC, in accordance with the provisions of Title VI of the Civil Rights Act of 1964 (78 Stat. 252, 42 U.S.C. §§ 2000d to 2000d-4) and the Regulations, hereby notifies all RESPONDENTS that it will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises will be afforded full and fair opportunity to submit LETTERS of INTEREST (LOIs) in response to this ADVERTISEMENT and will not be discriminated against on the grounds of race, color, or national origin in consideration for an award.

## **XIV. SMALL PROFESSIONAL SERVICE FIRM (SPSF) PARTICIPATION**

We encourage the use of Small Professional Services Firms (SPSF). Small businesses determined to be eligible for participation in the SPSF program are those meeting size standards defined by Small Business Administration (SBA) regulations, 13 CFR Part 121 in Sector 54 under the North American Industrial Classification System (NAICS). The SPSF program is a race, ethnicity, and gender-neutral program designed to increase the availability of contracting opportunities for small businesses on federal, state or locally funded contracts. SPSF participation is not contingent upon the funding source.

The Firm, at the time the Letter of Interest is submitted, shall submit a listing of all known SPSF firms that will participate in the performance of the identified work. The participation shall be submitted on the Department's Subconsultant Form RS-2. RS-2 forms may be accessed on the Department's website at [NCDOT Connect Guidelines & Forms](#).

The SPSF must be qualified with the NCDOT to perform the work for which they are listed.

## **XV. PREQUALIFICATION**

The Department maintains on file the qualifications and key personnel for each approved discipline, as well as any required samples of work. Each year on the anniversary date of the company, the firm shall renew their prequalified disciplines. If your firm has not renewed its application as required by your anniversary date or if your firm is not currently prequalified, please apply to the Department **prior to submittal of your LOI**. An application may be accessed on the Department's website at [Prequalifying Private Consulting Firms](#) -- Learn how to become Prequalified as a Private Consulting Firm with NCDOT. Having this data on file with the Department eliminates the need to resubmit this data with each letter of interest.

Professional Services Contracts are race and gender neutral and do not contain goals. However, the Respondent is encouraged to give every opportunity to allow Disadvantaged, Minority-Owned and Women-Owned Business Enterprises (DBE/MBE/WBE) subconsultant utilization on all LOIs, contracts and supplemental agreements. The Firm, subconsultant, and sub-firm shall not discriminate based on race, religion, color, national origin, age, disability or sex in the performance of this contract.

**XVI. DIRECTORY OF FIRMS AND DEPARTMENT ENDORSEMENT**

Real-time information about firms doing business with the Department, and information regarding their pre-qualifications and certifications, is available in the Directory of Transportation Firms. The Directory can be accessed on the Department’s website at [Directory of Firms](#) -- Complete listing of certified and prequalified firms.

The listing of an individual firm in the Department’s directory shall not be construed as an endorsement of the firm.

IF APPLICABLE, questions may be submitted electronically only, to the contact above. Responses will be issued in the form of an addendum available to all interested parties. Interested parties should also send a request, by email only, to the person listed above to be placed on a public correspondence list to ensure future updates regarding the RFLOI or other project information can be conveyed. Questions must be submitted to the person listed above no later than June 28, 2024 by 2:00 p.m. The last addendum will be issued no later than July 2, 2024.

**XVII. SUBMISSION SCHEDULE AND KEY DATES**

- A. RFLOI Release – June 19, 2024
- B. Questions Due – June 28, 2024, by 2:00 p.m.
- C. Final Addendum Posted on CPRC Website – July 2, 2024
- D. LOI Due – July 8, 2024, by 2:00 p.m.
- E. Shortlisted Firms Notified – July 15, 2024 \*
- F. Interviews (if needed) – Week of July 22, 2024
- G. Consultant Selection – July 26, 2024
- H. Notice to Proceed – ASAP after selection.

The RFLOI, Q/A’s, and Addenda will be posted on the Central Pines Regional Council website here: <https://www.centralpinesnc.gov/requests-proposalsqualifications>

\* Notification will **ONLY** be sent to shortlisted firms.