

UPPER MERION TOWNSHIP
MONTGOMERY COUNTY, PENNSYLVANIA

REQUEST FOR PROPOSALS AND QUALIFICATIONS
FOR
MUNICIPAL ENGINEERING PROFESSIONALS



PROPOSAL INFORMATION

Release Date:
August 9, 2024

Submittal Deadline:
September 9, 2024@ 4:00PM

Proposal Submittal:
Upper Merion Township
Attn: Assistant Township Manager
175 West Valley Forge Road
King of Prussia, PA 19406

Contact for Questions:
Amanda Lafty
Assistant Township Manager

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I. General Information

A. Purpose and Intent

Through this Request for Proposal & Qualifications (RFP/Q), Upper Merion Township (hereinafter the “Township”) seeks to engage a vendor as Township Engineer commencing upon appointment. The bid includes services related to the Township’s general engineering needs as outlined in Exhibit A.

B. Background

Upper Merion is a Township of the Second Class located within Montgomery County, Pennsylvania that functions as a council-manager form of government, supervised by a five (5) member Board of Supervisors. The Township is just over 17 square miles in area encompassing the villages of Gulph Mills, King of Prussia, Radnor, Swedeland, Swedesburg and Wayne. The current population is 33,613 residents. Upper Merion Township has separate engineering services for its General Authority, Sanitary and Stormwater Authority and Transportation Authority.

C. Credentialing and Insurance Required

The selected firm must consist of certified engineering professionals with degrees from accredited institutions that are registered and licensed to perform general engineering services in the Commonwealth of Pennsylvania; the selected firm must also carry adequate insurance coverage, both for liability and professional liability, as determined reasonably appropriate in the opinion of the Township.

D. Questions

The RFP/Q will be posted on the Township’s website, (www.umtownship.org). Any questions regarding this Request for Proposal should be directed to the Assistant Township Manager in writing (preferably email) to:

Upper Merion Township
Attn: Amanda Lafty, Assistant Township Manager
175 West Valley Forge Road
King of Prussia, PA 19406
Email: alafy@umtownship.org

E. Addenda

To ensure consistent interpretation of certain items, answers to questions the Township deems to be in the interest of all will be made available to all other Respondents. Responses to questions will be codified in an addendum and issued to all Respondents, with a requirement to acknowledge and agree to any provisions changed or incorporated by the addendum.

The Township, at any time may, at its discretion and without explanation to the prospective proposer(s), choose to discontinue this RFP/Q without obligation to any proposer(s) who have submitted a proposal.

II. Proposal Contents

A. General Requirements

1. *Proposal Submission*

Three (3) print and one (1) electronic copy of the proposal shall be received in a sealed envelope and must be prominently marked on the outside with “**RFP/Q – Engineer Services**” (2024).”

- a) Sealed qualifications must be submitted no later than September 9, 2024 at 4:00PM to:

Upper Merion Township
Attn: Assistant Township Manager
175 West Valley Forge Road
King of Prussia, PA 19406

- b) Qualifications must be mailed, or hand delivered. Emailed electronic copies are acceptable if they are submitted in conjunction with print copies. **Late qualifications will not be accepted.**
- c) All submitted qualifications will be the property of Upper Merion Township.
- d) This RFP/Q shall not, without the Township’s prior written consent, be disclosed to any Proposer, in any manner whatsoever, in whole or in part, or used for any purpose other than the submission of qualifications to the Township.

2. *Preparation Costs*

The Municipality will not be responsible for any costs associated with the preparation, submission or presentation of any proposal.

3. *Open Records Law/Public Information*

Under the Pennsylvania Right-to-Know (the “Law”), 65 P.S., §67.101, eq. seq., as amended, and other applicable laws, a record in the position of the Municipality is presumed to be a public record subject to disclosure to any legal resident of the United States upon request, unless protected by a statutory exception.

B. Format of Technical Proposal

1. Title Page and Table of Contents

- a) The title page should show the RFP/Q subject; the institution’s name; contact name, title, office address, telephone number and email address; and the date of the proposal.
- b) The table of contents should identify matters submitted by section and page number.

2. Contact Information

On a single cover sheet in your proposal, please provide:

- a) The name of firm, owner, address, and telephone number.
- b) The address and telephone number of firm’s most local office to Upper Merion Township, if not the same as firm’s Headquarters.
- c) The name and contact information for the firm’s primary contact.
- d) E-mail address for firm principals or individuals working with the Township.
- e) The year the firm or individual practice was established.

3. Personnel Qualifications

- a) Identify who will serve in the positions of firm’s Principal Engineer or Manager, Appointed Township Engineer, construction inspectors and other support staff.
- b) Provide a resume and summary of their experience for the individual/s who will serve in the position/s.
- c) Provide the same for other professionals (if any) in the firm who may assist with the provision of services.

4. *Capability*

- a) Provide information about selected professional and firm’s ability to perform on short notice and in a timely manner. If the appointed professional is not available, are there other means of responding to requests?
- b) Describe the selected professional and firm’s approach to communicating with the Township regarding progress reports, status reports, recommendations, status of opinions, records retention, ownership of records, transmittal of records to Township, etc.
- c) Describe the selected professional and firm’s approach to continuing education and understanding of current stormwater management regulations.
- d) Describe your firm’s recent work with grant applications and management.

5. *Project Management*

Provide a plan for service delivery, and an explanation of how tasks and projects are managed within the firm to ensure timely response and completion.

6. *Client List and References*

Provide a list of all current and past municipal clients and a description of the Firm's experience, both within Montgomery County and the Commonwealth of Pennsylvania, in performing services of the type described in this RFP/Q, as well as the duration of the same, specifically identifying client size and specific examples of work within the scope of services required under this RFP/Q in similarly sized municipalities. If the Firm has previously worked with the Township, please add dates and capacity of the work.

Include at least three references from municipalities of similar size including names, contact person, and phone numbers.

7. *Conflicts of Interest*

Identify any existing or potential conflicts of interest and disclose any representation of any party or other relationship that might be considered a conflict of interest regarding this engagement or the Township. Identify what percentage, if any, of the firm's practice provides services to local developers and businesses. Provide a list of all Pennsylvania developers served by the firm.

8. *Litigation*

If the vendor or any principal therein has been engaged as a defendant in any litigation involving a sum of \$100,000 or more and/or has been subject to any professional disciplinary action over the last three (3) years, the bidder must provide a description of the litigation and/or disciplinary action.

**NOTE: NO FEES AND/OR PRICING OF THE RFP/Q
SHOULD BE INCLUDED IN THE TECHNICAL PROPOSAL**

C. Format of Cost Proposal

1. The Township expects to pay an hourly fee for the services provided by the firm. Each Firm must indicate the hourly fee charged for the proposed services by the grade of the employee to be assigned to the task. If additional services or overhead charges such as travel, mileage, copying/printing, project supplies, photographs, telephone calls or other charges will be billed in addition to the proposed hourly fee, such charges shall be indicated within the proposal.
2. Include a sample invoice for services depicting the billing format and the level of detail in the description of the services provided. Include backup documentation in the form of inspection reports, field reports, etc.
3. Include the anticipated annual increase in the firm's rate schedule and the percentage change in the firm's rates, if any, over the last five (5) years.
 - i. Include any reduced fees offered to other municipalities, government entities, economic development or nonprofit organizations, and civic organizations.
4. Include any other fees or charges not outlined in the other sections of the cost proposal.
5. Pricing will be reviewed based on reasonableness for services being provided, competitive market rates, and fee structure. The Township is not obligated to select the Proposal with the lowest fee proposal to perform these professional services.

III. Selection Process

A. Selection Procedures

1. Each interested firm shall provide written proposals and qualifications to the Township based upon the guidelines and information set forth in this RFP/Q.
2. A panel of Township Staff shall review and rank all proposals based upon the criteria established in this RFP/Q. Select firms will be invited for an interview with staff.
3. A maximum of three (3) firms may be short-listed to participate in an interview process with the Board of Supervisors. Additional evaluation steps may include, but not be limited to, an interview, a review of the firm's engineering fee structure, a detailed check of references, and such other items as the Board in its discretion may deem relevant.
4. Final determination of the appointment shall be made by the Board of Supervisors.
5. Selection of the firm to provide service will be based on timely written qualifications. Oral interviews may be conducted by telephone or video conferencing and in person to assist the Township in the selection process.

B. Evaluation Criteria

1. *General Approach*

All proposals will be reviewed by the Assistant Township Manager to determine responsiveness. Non-responsive proposals will be rejected without evaluation. For firms that satisfy the requirements of this RFP/Q, the Township's evaluation will be based upon criteria as received and outlined in this RFP/Q, including but not be limited to the following evaluation criteria, separate or combined, and not necessarily listed in order of significance.

2. *Documented Experience*

The firm's documented experience in successfully completing contracts of a comparable size and scope to the engagement addressed by this RFP/Q.

3. *Qualifications and Experience*

The qualifications and experience of the firm's management, supervisory and other key personnel assigned to the engagement, with emphasis on documented experience in successfully completing work on contracts of comparable size and scope to the services required by this RFP/Q. Experience serving in this role for

similar communities will be considered positively. Proof of an understanding of the role and track record of effectively providing such services is preferred.

4. *Overall Ability*

The overall ability of the firm to mobilize, undertake and successfully complete the scope of work in a timely fashion. This criterion will include, but not be limited to, the following factors: the number and qualifications of management, supervisory and other staff proposed by the firm to perform the services required by this RFP/Q; and the availability and commitment to the engagement of the firm's management, supervisory and other staff proposed.

5. *Costs and Fee Schedules*

The costs and fee schedules included in the proposal will be reviewed against other firms.

6. *References*

The Township may perform reference checks for each firm. References should be able to describe the firm's responsiveness, availability, and ability to complete projects in a timely, orderly and cost-effective manner.

7. *Firm's Understanding, Approach and Quality of Proposal*

These selection criteria will allow the Township to award additional consideration based upon the quality of the firm's proposal, understanding of the Township's needs, approach to the work, or any other positive qualities.

C. Reservations Regarding Selection

The Municipality reserves the right to do any or all the following:

1. conduct interviews with some or all the respondents.
2. reject any or all qualifications.
3. waive any informality or irregularity in a proposal.
4. hold all qualifications for a period of sixty (60) days after the date fixed for the opening thereof.
5. enter good faith negotiations with the respondents to modify service or project descriptions to a greater or lesser magnitude than described in this RFP/Q or any proposal.
6. accept the proposal that the Township deems at its sole discretion, to be the most favorable in its best interest.
7. enter good faith negotiations with the selected respondents regarding the pricing set forth in the Proposal prior to entering into an agreement. If the agreement's negotiations cannot be concluded successfully with the first selected respondent; the Township may negotiate and agreement with the second selected respondent.
8. re-advertise this RFP/Q for new qualifications as may be deemed necessary at the sole discretion of the Township.

IV. Contract Term

The Township anticipates completing an RFP/Q every five years, with annual reappointment at the Reorganization meeting each January.

EXHIBIT A

Upper Merion Township

Request for Proposals and Qualifications for Municipal Professionals

Minimum Qualifications

Applicant firms **must** establish that they meet the minimum qualifications:

MUNICIPAL ENGINEER

1) Scope of Work

The Township is soliciting proposals and qualifications from firms interested in providing municipal engineering services. The firm must have all applicable licenses to perform municipal engineering in Pennsylvania, have at least five (5) years of experience in a similarly sized municipality, and have experience performing engineering studies and providing recommendations on a myriad of issues, including but not limited to:

a) Plan Review Services

The selected Municipal Engineer will provide technical review of, and answer inquiries relating to site plans, subdivision plans, improvement plans, land disturbance plans, construction plans and escrows relating to projects proposed by applicants to be developed in the Township to ensure that such conform to codes adopted by the Township.

b) Construction Inspection Review Services

The selected Municipal Engineer will provide construction inspections throughout the land development process to ensure sites are built in accordance with approved plan.

c) Municipal Project Design Services

The selected Municipal Engineer must have the capability to design a full array of public works type projects including wastewater treatment, and stormwater management systems, in a manner that the infrastructure is functional and cost effective. The selected consulting Municipal Engineer must be able to provide structural, mechanical, electrical and civil guidance for municipal structures.

d) Environmental Services & Regulatory Agency Interactions

The selected Municipal Engineer shall be well versed in regulatory compliance and permitting and be familiar with approval procedures of regulatory agencies including but not limited to the following: Pennsylvania Department of Transportation, PA Department of Conservation and Natural Resources, Pennsylvania Department of Environmental Protection, Pennsylvania Emergency Management Agency, U.S. Army Corps of Engineers, Federal Emergency Management Agency, Federal Highway Administration, and the U.S. Environmental Protection Agency.

e) Grant/Bid Assistance

The selected Municipal Engineer shall, as requested, complete or assist in the completion of grant applications and preparation and management of the bidding process for non-traffic projects.

f) Surveying, Easements and Related Services

The selected Municipal Engineer shall have the capability of performing boundary surveys, topographic surveys, construction staking, prepare easement plats and easement documents, and assist in easement acquisition.

g) CAD and GIS Capabilities

The selected Municipal Engineer shall have computer aided drafting and geographical information system capabilities upon request.

h) Meeting Attendance and Participation

The selected Municipal Engineer (or firm designee) may be expected to attend a variety of municipal meetings, including, but not limited to, board meetings, planning and zoning meetings, meetings of affected property owners, and meetings with municipal staff and developers.

The Board of Supervisors meets on the first (1st) and second (2nd) Thursday of each month. The Planning Commission meets on the second (2nd) and fourth (4th) Wednesday of each month. The selected Municipal Engineer will hold a minimum of four (4) weekly office hour(s) in house at a mutually beneficial time, and attend other meetings as necessary.

i.) Work Product

The selected Municipal Engineer will be expected to provide the Township with copies of all work products without limitation, which shall include reports, analyses, correspondence, plans, proposals, submittals, schematics, exhibits, drawings, and any other documents produced in connection with the consulting relationship with the Municipal in printed form, as well as in electronic form to include portable document format and the root file(s).

j.) Assignment of Professional Engineer

The selected Municipal Engineer shall assign to the Township a minimum of one (1) staff person who is a Professional Engineer licensed to practice in the State of Pennsylvania.

k.) Responsiveness

The selected Municipal Engineer must commit to provide services to the Municipal in a timely manner, without unreasonable delays.

l.) Proximity

The selected Municipal Engineer must be located within reasonable proximity to the Township to ensure meeting attendance if requested, meeting coordination and the conveyance of documents when sent via courier.