



## Request for Statements of Qualifications (RFQ)

### Strategic Plan Consulting

Date Issued: October 21, 2020

Deadline: November 6, 2020 at 5:00 p.m. (MST)

Issued by:

Greater Salt Lake Municipal Services District

## **1. INTRODUCTION**

The Greater Salt Lake Municipal Services District (the “MSD”) is soliciting Statements of Qualifications (“SOQs”) from qualified firms to provide one or more of the following professional services: (1) executive engagement with the MSD Board of Trustees and staff; (2) visioning and future casting sessions; (3) strategic planning offsite meetings (retreat); (4) strategic plan drafting; and (5) follow-up meetings.

## **2. CONTACT**

The project representative and contact for this Request for Statements of Qualifications (RFQ) is Brian Hartsell, Associate General Manager. He can be reached at (385) 468-6685 and his e-mail address is [bhartsell@msd.utah.gov](mailto:bhartsell@msd.utah.gov).

## **3. BACKGROUND**

The Greater Salt Lake Municipal Services District, which was established in 2015, is located within Salt Lake County, Utah. The District is a Local District, created under Title 17B of the Utah Code, specifically § 17B-2a-1101 et. seq. The District is comprised of five Metro Townships: Copperton Metro Township, Emigration Canyon Metro Township, Kearns Metro Township, Magna Metro Township and White City Metro Township (the “Metro Townships”); the Town of Brighton; and most of unincorporated Salt Lake County. The Metro Townships gained official recognition as municipalities in January of 2017 as a result of a general election of their citizens that took place in November 2015, with the citizens approving the incorporation of their respective communities.

Many of the municipal services for the areas now served by the MSD were formerly provided by a division of Salt Lake County (Township Services) until the MSD began operating independently in 2017. Until the adoption of Senate Bill 124, which was effective in May of 2019, the County Mayor acted as the executive officer of the MSD. With the passage of SB 124, that role is now assumed by the MSD General Manager, who is appointed by the Board of Trustees. The District offices are located in Salt Lake City, the capital of Utah, approximately three miles south of downtown, but no part of Salt Lake City lies within the corporate boundaries of the MSD. The communities served by the MSD are located throughout Salt Lake County including canyons in the east and south portions of Salt Lake County.

The MSD operates under a governing Board of Trustees which is comprised of elected mayors representing each Metro Township, a member of the Brighton Town Council, and one Salt Lake County Council member who represents unincorporated Salt Lake County. Policy making is vested in the Board of Trustees, which is responsible, among other things, for passing resolutions, adopting the budget, approving contracts, appointing committees and establishing personnel and other policies. The District’s General Manager carries out the policies of the Board of Trustees and oversees the day-to-day operations of the MSD.

## **4. SCOPE OF THE WORK**

A. Consultants (firms/respondents) should respond to this RFQ with a Statement of Qualifications (“SOQ”) that addresses all of the following services. These descriptions identify the minimum

scope of services that may be provided by a qualified consultant. Specific details of the scope of work will be identified after the selection of the consultant.

- B. Strategic planning
  - a. Provide technical assistance to develop a strategic plan that will be the foundation for short and long-term planning decisions.
  - b. Assist in the creation of vision, mission, core values and goals for the MSD.
- C. Stakeholder engagement
  - a. Interface with the stakeholders to identify key components and strategies:
    - i. Board of Trustees
    - ii. Staff
    - iii. Key service providers
    - iv. Communities served by the MSD, and
    - v. Public, if applicable

## 5. RESPONDING TO THE RFQ

The MSD welcomes all respondents and encourages them to share their expertise in strategic planning consultancy that can advance our organization. Tell us why you are the right partner for this project. We will assess the responses based upon the respondent's experience and how well the responses address the scope of work. We request the following specific information from respondents:

- A. **Cover letter:** Please include the respondent's name, address of the nearest local office, the contact name for a response, and that person's contact information. Please keep the cover letter to one page. The cover letter is to be signed by an officer of the respondent who is authorized to bind the respondent.
- B. **Experience:** Provide a statement of experience discussing past performance, capabilities and qualifications. Identify other similar projects with which your firm has been involved. Explain how your firm is a suitable partner for the described scope of work.
- C. Identify key personnel who would be assigned to the project, including qualifications, experience and background for each.
- D. **Additional information:** Provide any additional information that will help us evaluate your firm's fit for this scope of work. Please note, you may only include information that directly responds to the RFQ, please do not include any promotional material or company brochures that do not directly respond to this RFQ.
- E. **References:** Provide at least three references, including contact information, from previous similar contracts or partnerships.
- F. **No Conflict Statement:** Provide a statement that no conflict of interest issues exist with the MSD, any Metro Township, the Town of Brighton or Salt Lake County at the time of submission of the SOQ, signed by an officer who is authorized to bind the respondent. This statement may be included in the cover letter.

**Please keep the response to no more than 10 pages total** (including cover page). Please do not attach any marketing material, brochures or items that do not directly respond to this RFQ.

## 6. SOQ EVALUATION

The criteria to be used to evaluate each SOQ are as follows:

- A. Scoring Methodology:

- a. Five Points (Excellent)
  - b. Four Points (Very Good)
  - c. Three Points (Good)
  - d. Two Points (Fair)
  - e. One Point (Poor)
- B. Multiplication Factors or Weighting:
- a. Each scored line item will be multiplied by a weighted importance factor as shown. The scoring will be multiplied by the weighted importance factor to give the total points for that line item.
- C. Pass/Fail:
- a. Some items require no scoring but are required as an essential part of the SOQ. These items may be scored on a pass/fail basis. Failure to include on any pass/fail item (see 5. above, "Responding to the RFQ") may result in the rejection of the SOQ.
- D. SOQ Evaluation Scoring

Possible Points	Weighted Factor	Maximum Points	Criteria
5	3	15	Demonstrated qualification and competence of "Team". History of respondent and resume of Team members.
5	3	15	Demonstrated breadth of experience; level of success and performance of projects of a similar type, scope, and complexity.
5	6	30	Demonstrated strength of proposed team. The ability to meet demanding schedule, maintain quality, and work with MSD team, including officials and staff.
5	4	20	Availability of team members and demonstrated evidence of success in scheduling and meeting deadlines and successfully delivering projects on time.
5	4	20	References
		100	

**\*NOTE:** Reference checks may influence evaluation of any SOQ as well the subsequent evaluation of the above criteria as related to a given SOQ.

- E. Committee Evaluation of SOQs: Each SOQ will be evaluated by the MSD's Selection Committee. The SOQs will be scored on the basis of the submittals outlined in Section 5. Non-responsive SOQs (those not conforming to the RFQ requirements) may be eliminated. The respondent bears sole responsibility for the items and information included, or not included, in the SOQ submitted by that respondent. The MSD reserves the right to disqualify any SOQ that includes significant deviations or exceptions to the terms, conditions and/or specifications in this RFQ. Upon completion of the initial scoring, the MSD may elect to have further discussions with responsible firms that submit SOQs for the purpose of assuring a full understanding of, and

responsiveness to, the requirements of this RFQ. Final recommendations of the highest ranked firm(s) will be made by the MSD's Selection Committee. Final approval of a contract will be by motion of the MSD Board of Trustees.

- F. **Consultant Selection and Compensation:** Negotiations will be undertaken with the top scoring respondent to formalize the scope of services and negotiate the fee structure. If negotiations are not successful with the initially selected respondent, negotiations will be conducted with the next highest ranked respondent, and so on, until the MSD and a respondent reach an agreement on the hourly rates, allowable costs, fixed fee (if applicable), and not to exceed fee (if applicable) for the respondent's services, or the MSD cancels this RFQ. The negotiated hourly rates, allowable costs, fixed fee and not to exceed fee and the contract will be presented to the MSD Board of Trustees for final approval. STATEMENTS MADE BY MSD PERSONNEL DURING THE RFQ PROCESS ARE NOT BINDING ON THE MSD BOARD OR ON THE MSD AND MAY NOT BE RELIED UPON BY ANY RESPONDENT UNTIL THEY HAVE BEEN CONFIRMED BY THE BOARD.

## 7. RFQ TIMELINE

The following schedule is the anticipated timeline of the selection process:

- RFQ advertised on or before October 22, 2020
- Questions due by email on or before October 30, 2020 at 12:00 pm. Questions and answers will be shared with all interested parties.
- Proposals are due by November 6, 2020 at 5:00 pm, MST.
- Presentations to Board of Trustees by November 12, 2020.
- Evaluation and selection on or before November 19, 2020, after which negotiations will be conducted as stated in 6.6 above.

## 8. RFQ RESPONSE PROCESS

Questions related to this RFQ are to be emailed to Brian Hartsell, Associate General Manager, at [bhartsell@msd.utah.gov](mailto:bhartsell@msd.utah.gov) no later than 12:00 pm (MST) on October 29, 2020. Any submission of questions relating to this RFQ shall include "Strategic Plan Consulting" in the email subject line and include the name of the person and respondent submitting the question(s).

The MSD assumes no liability for assuring accurate/complete/on time e-mail transmission and receipt. **The receipt of a response to this RFQ does not constitute an agreement between the MSD and the submitting respondent.** The MSD reserves the right to accept or reject any or all submissions.

Final SOQ submission must be received in an electronic form by 5:00 pm (MST) on November 6, 2020. Please send responses by email in PDF format to [bhartsell@msd.utah.gov](mailto:bhartsell@msd.utah.gov). Your final RFQ submission shall include "Strategic Plan Consulting" in the email subject line.

## 9. RESERVATION OF RIGHTS

The MSD reserves rights to:

- A. Accept or reject any or all SOQs submitted pursuant to this RFQ.
- B. Waive or modify and irregularities in the RFQ.

- C. Request additional information or modifications to SOQs prior to award if such is in the best interest of the MSD.
- D. Use any ideas and/or information submitted in the SOQs received, unless covered by legal patent or recognized proprietary rights. Any claimed legal patent or proprietary right shall be clearly and plainly identified in a SOQ. If not adequately identified in the SOQ, the consultant shall irrevocably be deemed to have waived and relinquished any legal patent or proprietary right. Selection or rejection of the SOQ does not affect the MSD's right to use submitted ideas and/or information.
- E. In the event of unsuccessful contract negotiations or contract termination, the MSD may enter into contract negotiations with other qualified firms that submitted acceptable SOQs.
- F. Cancel or modify the terms of this RFQ and/or the Scope of Work at any time and for any or no reason preceding the execution of a contract.

## **10. GENERAL TERMS AND CONDITIONS**

- A. Award/Public Statement – When the selection of the respondent to perform services outlined in the Scope of Work is announced (which may not occur before negotiations are complete), a written statement identifying the approved respondent and the total score awarded to that respondent by the Selection Committee will be published. Without identifying the other respondents by name (i.e. Identified as “Offeror A”, “Offeror B” – etc.), the published list will state each Offeror’s total score.
- B. GRAMA – As a governmental entity, the MSD is subject to the Government Records Access and Management Act, Title 63G, Chapter 2 of the Utah Code (GRAMA), and cannot guarantee that information provided in a SOQ will not be subject to disclosure under GRAMA.
- C. Legal Requirements – The successful respondent will be required to satisfy all applicable governmental laws, ordinances, rules and regulations, including the requirements of Utah Code Ann. § 63G-12-302(3) respecting the verification of the status of the respondent’s new employees.
- D. Contract – The respondent selected, after a successful negotiation, to provide the services identified in the Scope of Work will be expected to enter into a contract that is reasonably acceptable to the MSD. The contract may be for a period of up to five (5) years and may be canceled at any time with or without cause upon 30 days written notice from either the MSD or the respondent.
- E. Insurance – The respondent with which the MSD contracts shall maintain insurance coverage in amounts that are reasonable for respondents providing similar services in Salt Lake County, Utah, including workers compensation insurance as required by law and professional and liability insurance. The successful respondent may be required to provide certificates of insurance for the MSD’s review and reasonable approval.
- F. Rejection of SOQs – The MSD reserves the right to reject any and all of the SOQs received in response to this RFQ.
- G. Incurred Costs – The MSD will not be liable for any cost incurred by any respondent for any work performed prior to the execution of a contract for professional services by the MSD and the respondent.
- H. Addenda to the RFQ – In the event the MSD decides to revise any part of this RFQ, public notice will be provided and all known respondents will be notified by e-mail that a copy of the addenda is available. It is the responsibility of the respondents that intend to respond to the

RFQ to ensure that their contact information is given to the MSD and that it is correct. The final date for the issuance and notifying of an addenda to this RFQ will be five (5) days prior to the due date of the SOQ.

**For more information regarding the MSD please visit our website at [www.msd.gov](http://www.msd.gov).**