

ACEC/PA

AMERICAN COUNCIL OF ENGINEERING COMPANIES
of Pennsylvania



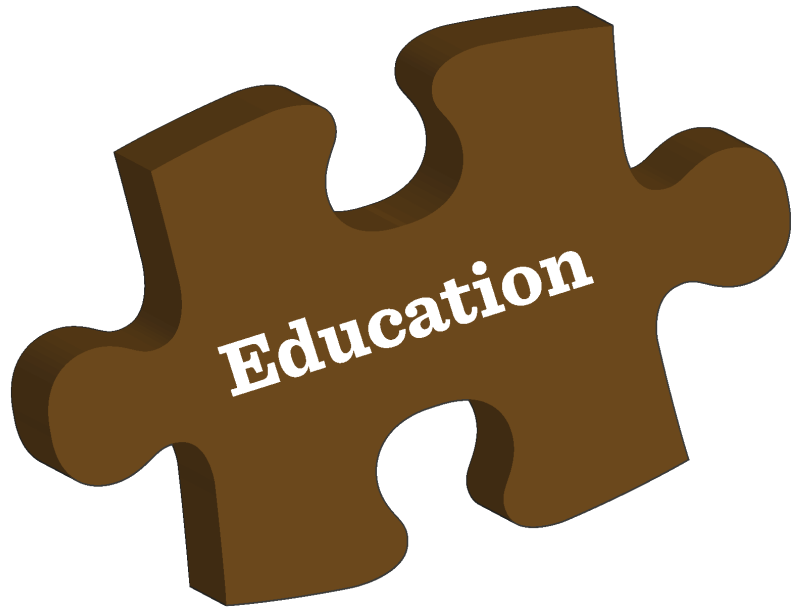
- ✓ Nearly 13,000 engineers, architects, land surveyors and other specialists
- ✓ Strengthen and foster the relationships between member firms, clients, government agencies and elected officials.
- ✓ With safety and quality in the forefront, ACEC/PA strives to find the right solutions for our partners in an efficient and professional manner.



ACEC/PA has valuable relationships with clients, government agencies, coalitions, other associations like PSATS and businesses; and works diligently to provide access to valuable information and resources designed to enhance all projects.



ACEC/PA advances legislative priorities that are most important to safety and quality while ensuring the industry helps to shape and influence issues that are critical to the consulting engineering industry and protecting the collaborations with partners such as PSATS members.



ACEC/PA hosts ongoing professional education and training for the consulting engineering industry and clients such as PSATS members, to ensure the highest level of safety, quality and knowledge is imparted for our members and in turn is an asset to our partners and clients. The association's opportunities are designed to help the membership retain top talent, increase engagement, and stay abreast of relevant industry changes and topics which in turn provides high level project outcomes.



ACEC/PA provides essential information and significant resources such as a bi-weekly newsletter, membership directory, access to industry experts and networking opportunities to help partners and clients become familiar with the association and its role in Pennsylvania.



ACEC/PA has 11 committees, each with a specific mission to enhance both the consulting industry and our strategic partnerships. Our municipal services committee focuses on challenges, solutions, quality and collaborations with local government agencies. Other committees which impact local government agencies include environmental, water and quality.

RFQ/RFP GUIDE FOR MUNICIPALITIES

➤ Develop Project Description

- Type of Project
- Location
- Size
- Intended Use
- Design Criteria
- Special Design Considerations



➤ Determine Services Required

- Engineering
- Architectural
- Environmental
- Interior Design
- Construction Management/Inspection



RFQ/RFP GUIDE FOR MUNICIPALITIES

➤ Determine if Procurement is a 1-Step or 2-Step Process:

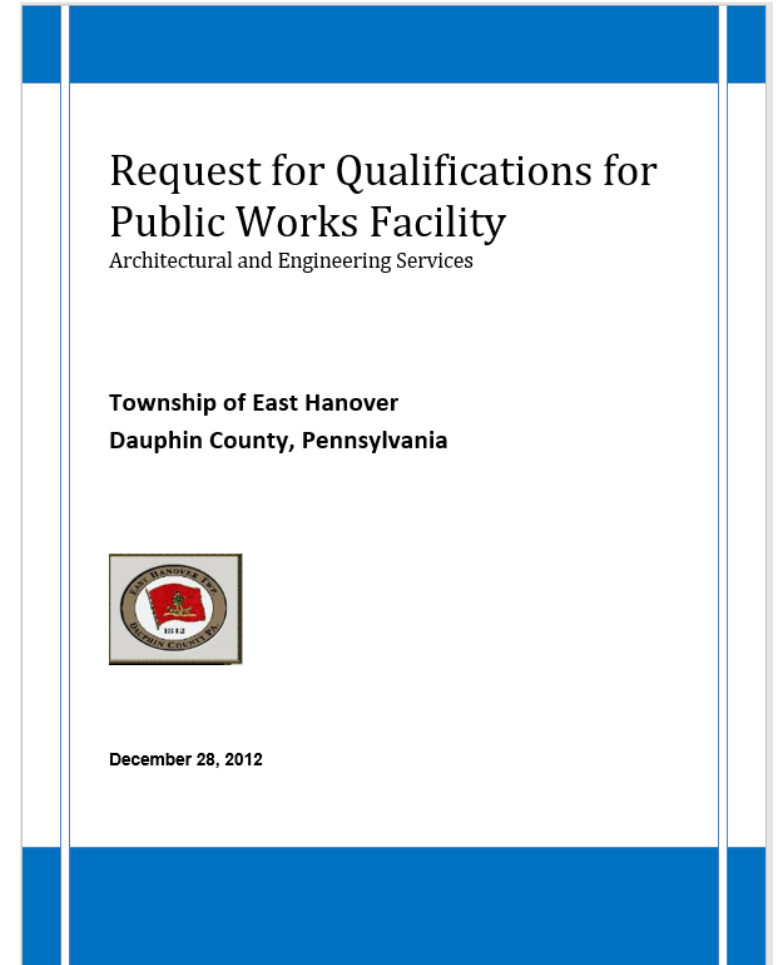
2-Step:

- First, Advertise/Request Qualifications
- Then, Shortlist and Request Detailed Proposals and Conduct Interviews

or

1-Step:

- Advertise for Qualifications *and* Detailed Proposals, then Shortlist and Conduct Interviews



RFQ/RFP GUIDE FOR MUNICIPALITIES

➤ Request for Qualifications Includes:

- Firm History & Office Location(s)
- Project Organization Chart & Key Project Staff Resumes
 - ✓ Project Manager
- Similar Project History, Project Profiles (Last 5-10 Years)
- History/Knowledge of Grant and Financing Programs
- Consultants (MEP, Traffic Engineering, Structural, Geotech, Cost Estimating, Environmental/Permitting, etc.)
- References
- Past Litigation, Claims
- Professional Liability Insurance
- Section on Initial Project Approach/Considerations

➤ Meet with Interested Firms to Review Project, Submittal Requirements, and Evaluation Criteria



RFQ/RFP GUIDE FOR MUNICIPALITIES

➤ Shortlist Selection Criteria to Review Qualification Statements

- Similar Type Projects (Prime and Consultants)
- Resumes (Project Manager, Key Design Leaders, Special Services): Worked on Similar Projects
- Consultants (History of Working Together)
- Reference Checks
- Firm Office Locations (where the work will be performed/managed)
- Cost Estimating Effectiveness/Change Order History
- Experience with Townships/Governmental Entities
- Litigation/Claims
- Approach to the Project/Innovative Techniques
- Experience with Funding/Grant Programs
- Interviews (if preferred by the Owner)



#10: Evaluation Matrix

Proposal Factor	Weighting	Score	Points
Price	%	1-5	Fixed
References	%	1-5	Subjective
Environmental Compliance	%	1-5	Fixed and Subjective
Transportation Compliance	%	1-5	Fixed and Subjective
Company History, Qualifications	%	1-5	Fixed and Subjective
Financial Stability	%	1-5	Fixed and Subjective
Bonus Section	5%	1-5	Fixed and Subjective
Total Points	105%		

➤ Establish Weighted Points or % Values on Selection Criteria

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➤ Request for Proposal from Shortlisted Firms to Include:

- Project Approach, Alternatives
- Key Project Issues/Address
- Detailed Scope of Services
- Project Management & Communication Approach
- Schedule: Design and Construction
- Quality Approach
- Budget Control

➤ Hold Pre-Proposal Meeting/Site Visit (Group or Individually with each Shortlisted Firm)



RFQ/RFP GUIDE FOR MUNICIPALITIES

➤ Proposal Selection Criteria

- Knowledge of Project and Key Issues
- Innovative/Alternative Approaches
- Project Management/Communication Approach
- Schedule
- Budget Control
- Quality Commitment/Approach
- Interview Results

➤ Establish Weighted Points or % Values on Selection Criteria

➤ Rank Firms and Negotiate Fee/Contract with Highest Ranked Firm



RFQ/RFP GUIDE FOR MUNICIPALITIES

Questions???



RFQ/RFP GUIDE FOR MUNICIPALITIES

Summary Checklist:

- ✓ **Develop Project Description and Services Required**
- ✓ **Decide if 1-Step or 2-Step Procurement**
- ✓ **Develop Request for Qualifications & Evaluate Responses w/ Selection Criteria**
- ✓ **Shortlist and Request Detailed Proposals**
- ✓ **Interview Shortlisted Firms**
- ✓ **Evaluate and Rank Firms Based on Selection Criteria**
- ✓ **Negotiate Fee and Contract with Top Ranked Firm**

FUNDING GUIDE FOR MUNICIPALITIES

➤ Agenda

- Identifying Available Funding Opportunities
- Deciding Whether to Apply or Not to Apply
- Increasing Application Competitiveness
- Summary



FUNDING GUIDE FOR MUNICIPALITIES

➤ Identifying Available Funding Opportunities:

- Project Description
- Project Components (Services Required)



**Twin Lakes Utilities System Water Outages
2017-2019**

Date	Locations	Affected Customers	Reason	Duration	Duration Hours
5/7/2019	Rock Place	3 houses	Repair main break	9am to 2pm	5
5/2/2019	Rock Place	Entire System	Replace inoperatable main valve	9am to 2pm	5
7/3/2018	Twin Lakes Drive	Entire System	Repair main break	9am to 4pm	7
7/2/2018	Teeple Way	Entire System	Repair main break	9am to 4pm	7
6/20/18 to 6/21/18	Well/Pump House	Entire System	Well pump failed and was replaced	2pm to 8pm 30 hours	30
6/11/2018	Allyson Lane	6 houses	Repair main break	9am to 4pm	7
3/2/2018	Well House	Entire System	Power outage due to storm	12pm to 2pm	2
11/27/2017	Kyra Lane	8 houses	Repair main break	9:30am to 3:30pm	6
11/21/2017	Kyra Lane	8 houses	Water main tie into existing main	9:30am to 3pm	5.5

FUNDING GUIDE FOR MUNICIPALITIES

➤ Identifying Available Funding Opportunities

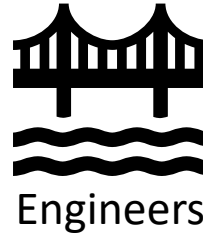
- Funding Sources
 - Membership Organizations (PSATs, PMAA, AWWA, etc.)
 - Consultants (Legal, Financial, Engineering)
 - Legislators (local, state & federal)
 - Agency Websites
 - IIJA (The Infrastructure Investment and Jobs Act)



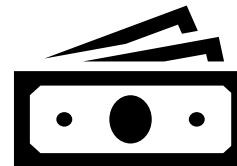
pennsylvania
DEPARTMENT OF COMMUNITY
& ECONOMIC DEVELOPMENT



pennsylvania
DEPARTMENT OF ENVIRONMENTAL
PROTECTION



Engineers



Financial



FUNDING GUIDE FOR MUNICIPALITIES

➤ Identifying Available Funding Opportunities

- Agency Websites:
 - PA DCNR: <https://www.dcnr.pa.gov/Communities/Grants/pages/default.aspx>
 - PA DCED: <https://dced.pa.gov/programs-funding/>
 - Municipal Assistance Program (MAP)
 - Commonwealth Financing Authority (CFA)
 - Watershed Restoration and Protection Program (WRPP)
 - Flood Mitigation Program
 - Multimodal Transportation Fund
 - Abandoned Mine Drainage Abatement and Treatment Program
 - PA DEP: <https://www.dep.pa.gov/Citizens/GrantsLoansRebates/Pages/default.aspx>
 - Mariner East 2 (MEII)
 - PennDOT: <https://www.penndot.gov/Doing-Business/Pages/dotGrants.aspx>
 - PENNVEST: <https://www.pennvest.pa.gov/Information/Funding-Programs/Pages/default.aspx>
 - Dirt, Gravel & Low Volume Roads: <https://www.dirtandgravel.psu.edu/>

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➤ Identifying Available Funding Opportunities

- Agency Websites:
 - Federal Government: <https://www.grants.gov/>
 - USDA Rural Development: <https://www.usda.gov/topics/farming/grants-and-loans>
 - Rural Utility Service
 - Community Facilities Program
 - FEMA: <https://www.fema.gov/grants>
 - PEMA: <https://www.pema.pa.gov/about/Pages/Grants.aspx>
 - ARC: <https://www.arc.gov/funding/ARCGrantsandContracts.asp>
 - U.S. Fish & Wildlife Service: <https://www.fws.gov/grants/>
 - U.S. DOI: <https://www.grants.gov/learn-grants/grant-making-agencies/department-of-the-interior.html>
 - NCRS:
<https://www.nrcs.usda.gov/wps/portal/nrcs/detail/national/programs/?cid=stelprdb1048817>
 - OSFC: <https://www.osfcegrants.state.pa.us/OSFCHome.aspx>
 - US Army Corps of Engineers

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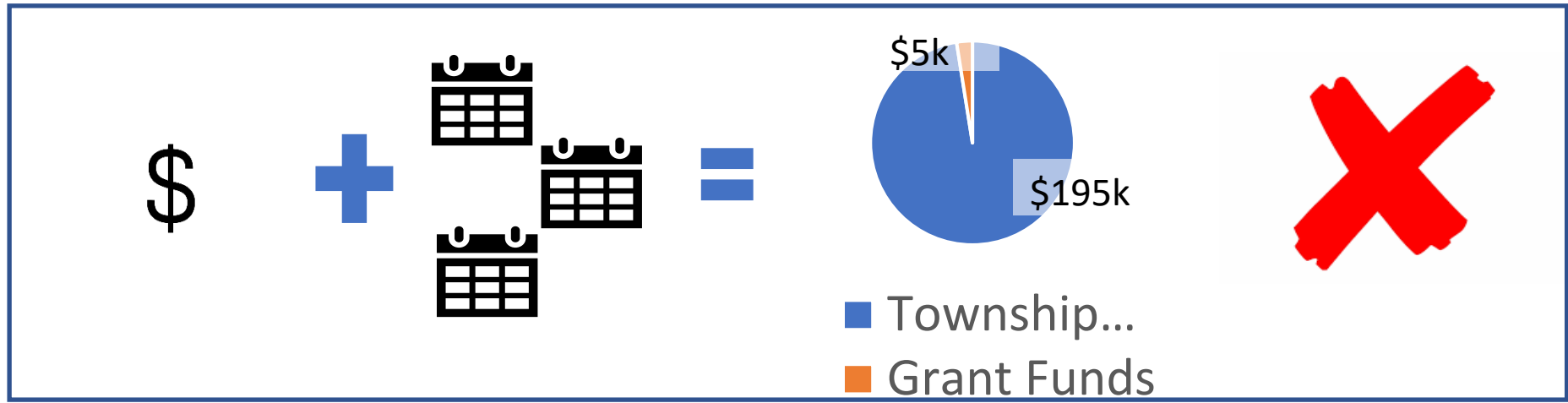
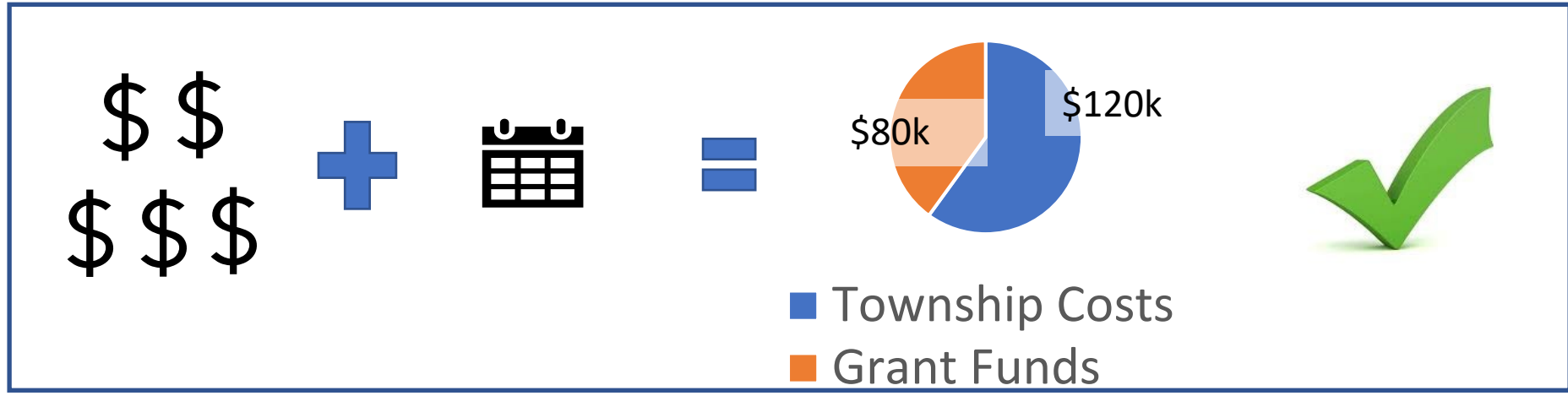
➤ Identifying Available Funding Opportunities

- Agency Websites:
 - Chamber of Commerce
 - County Conservation District
 - Local Organizations/Groups/Federations/Foundations
 - Community Development Block Program (CDBG)
 - Housing and Urban Development (HUD)

FUNDING GUIDE FOR MUNICIPALITIES

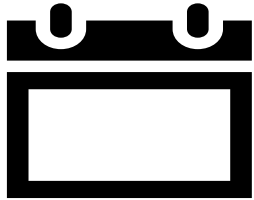
➤ Deciding Whether to Apply or Not to Apply

- Cost to Apply:



FUNDING GUIDE FOR MUNICIPALITIES

➤ Deciding Whether to Apply or Not to Apply



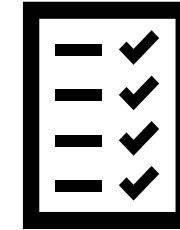
Funding Application Deadlines

- Complete
- Eligibility
- Project Schedule



Likelihood of Success

- Completeness
- Quality Support Docs
- Competition
- Amount of Funds
- Political Support
- Public Support



Funding Requirements

- Wages
- Early Payback
- Procurement (DBE, Steel, Engineering, Equip.)
- Project Audits
- Environmental
- Project Schedule
- Design oversight

FUNDING GUIDE FOR MUNICIPALITIES

➤ Deciding Whether to Apply or Not to Apply

- Compare total project costs including interest and debt service of various funding options.

Example Evaluation for \$8,000,000 Project

Funding	Project Cost	Interest Rate	Monthly Debt Service	Total Debt Service
PENNVEST	\$8,100,000	1.651%	\$39,650	\$9,516,300
Bonds	\$8,300,000	2.500%	\$43,980	\$10,555,700
Bank Loan	\$8,050,000	3.000%	\$44,650	\$10,714,800

Depending on the option selected, this is a \$5,000/month or \$60,000/year budget savings

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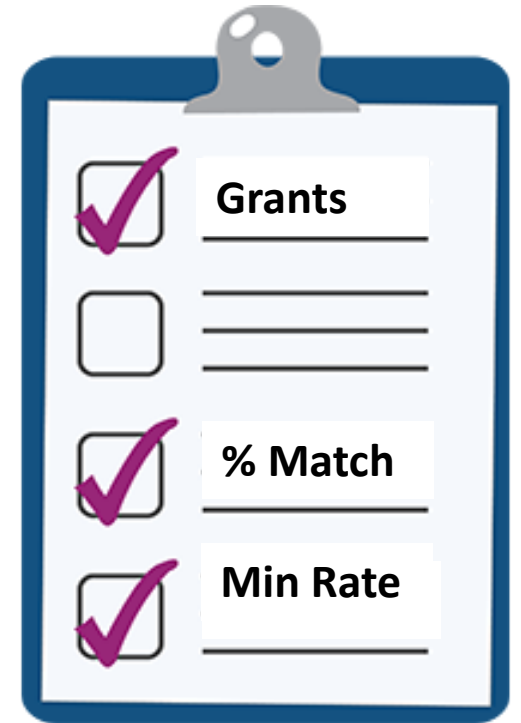
➤ Deciding Whether to Apply or Not to Apply



Funding Agency Staff



Costs to Comply



Potential Funding Offer

FUNDING GUIDE FOR MUNICIPALITIES

➤ Increase Application Competitiveness

- Plan Ahead
- Join Others
- Get the Project Out There
- Wording
- Organization
- Go the Extra Mile
- Get Support
- No News is Not Good News



FUNDING GUIDE FOR MUNICIPALITIES

Questions???

FUNDING GUIDE FOR MUNICIPALITIES

Summary Checklist:

- ✓ **Plan ahead! This process takes time.**
- ✓ **Know each project idea or need – even minor components.**
- ✓ **Literally dozens of funding types and opportunities (but limited and competitive). Use the suggested sources to identify all possible eligible programs. Be creative and mix your funding.**
- ✓ **Decide whether or not to apply.**
- ✓ **Get to know funding program managers and staff.**
- ✓ **Make your application competitive.**
- ✓ **Involve as many stakeholders as possible.**

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