



REQUEST FOR PROPOSALS (RFP)

To

**Develop a Regional Freight Mobility Plan
for the Greater Charlotte Region**

Requesting Party: Centralina Council of Governments (CCOG)

Submittal Address:

Centralina Council of Governments (CCOG)
Attn: Sushil Nepal, Project Manager
525 North Tryon Street, 12th Floor
Charlotte, North Carolina 28202

Submittal Deadline:

4:30 pm EST on February 27, 2015

**Greater Charlotte Regional Freight Mobility Plan RFP
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I. PURPOSE

The Centralina Council of Governments (CCOG) is soliciting proposals from qualified consultants to provide professional services in the development of a Regional Freight Mobility Plan for the Greater Charlotte global region. The Greater Charlotte Regional Freight Mobility Plan will address a number of logistical, infrastructure, land use and economic impact issues that have been previously identified through a series of public and private sector planning partnerships and economic development initiatives within the past decade. The Greater Charlotte Regional Freight Mobility Plan will:

- Assess the current state of truck and rail freight system operations and identify ways to effectively prioritize and address future freight congestion issues, key regional bottlenecks, infrastructure deficiencies, potential technologies to increase flow and safety, and urban and rural land use requirements and policies;
- Identify links that connect mobility of truck and rail freight modalities to regional economic development goals and address key opportunities, gaps and barriers to improve and promote economic development and job growth within the region's logistics and manufacturing industries as it relates to transportation and/or transportation planning;
- Align recommendations and action steps for regional partners based on upcoming USDOT MAP-21 and NCDOT requirements, including the development and assignment of qualitative performance measurement strategies that are responsive to federal and state freight mobility and efficiency goals.

The final outcome resulting from the development of a Greater Charlotte Regional Freight Mobility Plan will be a set of strategic recommendations and guidance that outlines decision-making processes and targeted regional actions and policies for priority investments within both urban and rural environments of the Greater Charlotte Region. Further, the Greater Charlotte Regional Freight Mobility Plan developed under this project must be in conformance with expected upcoming USDOT MAP-21 recommendations and guidelines, and planned in accordance for inclusion within an existing or future NCDOT and/or SCDOT Strategic Statewide Freight Plan.

RFP responses must satisfy the minimum criteria outlined within the scope of work within this document to be responsive to this solicitation. Any modifications or enhancements proposed beyond the identified scope of work outlined within this document must be clearly and concisely identified, including providing separate estimated cost detail for each task or modification. The successful consultant or team must demonstrate previous similar project expertise, technical capabilities of proposed staff, a solid understanding of the proposed scope of work and Greater Charlotte regional issues, and possess sufficient technical and staff availability to develop the Greater Charlotte Regional Freight Mobility Plan within the expected project timeline.

Responses to this RFP must be received by the designated CCOG Project Manager by **4:30 pm EST on February 27, 2015**. Interviews with one or more proposers will be scheduled and conducted at the discretion of the CCOG and its partners in person or by phone and/or Skype. The selected consultant or team will be required to successfully complete the project no later than **December 31, 2016**.

II. BACKGROUND

Centralina Council of Governments (CCOG) is the state-designated lead regional planning organization for the nine counties of the Greater Charlotte Region and has a voluntary membership of 66 municipalities and four (4) metropolitan and rural planning organizations. The Greater Charlotte Region includes the counties of Anson, Cabarrus, Gaston, Lincoln, Iredell, Mecklenburg, Rowan, Stanly and Union and is home to approximately 1.7 million people, making it the largest of the 16 councils of governments in the State of North Carolina. CCOG provides services in Community and Economic Development, Workforce Development, Aging and Regional Planning (land use, transportation and environmental/energy).

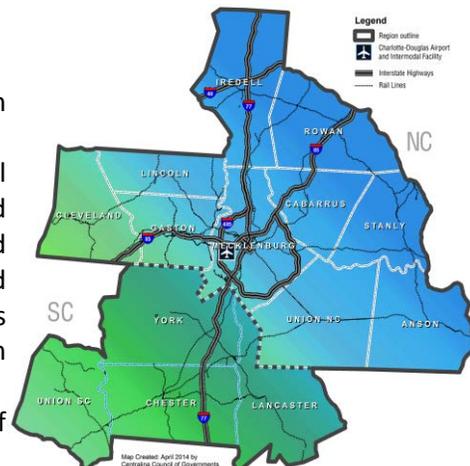
The Greater Charlotte Region study area for this project is defined as a 14-county bi-state region which includes Anson, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly and Union Counties in North Carolina and Chester, Lancaster, Union and York Counties in South Carolina.

Regional stakeholders have agreed upon the need for a Regional Freight Mobility Plan through the course of a number of related planning processes and studies conducted since 2009. The deliverables resulting from the Greater Charlotte Regional Freight Mobility Plan scope of work are expected to align with top priorities identified by the over 5,000 participants in the CCOG's 2012-2015 CONNECT Our Future Regional Growth Framework public engagement process, and will assist the Region and its stakeholders in the development of answers to such critical issues as:

- How land use patterns can be enhanced through the efficient movement of goods;
- What policies and regulations affect state, regional and inter-regional freight mobility for rail, truck, air cargo and port modalities within the study area;
- Where the most efficient placement and siting of employment centers should occur relative to regional transportation amenities and corridors;
- How to balance regional housing development to provide affordable employee and employer options and balance mobility needs;
- Identification of existing and future desired freight technologies and methods that correlate with regional workforce capabilities and capitalize on other regional assets, including research and development of energy alternatives, emerging technologies and Advanced Manufacturing enhancements;
- Identify improvements to mitigate air quality impacts and reduce transportation network congestion and delay.

Greater Charlotte Regional Characteristics

The Greater Charlotte Region's rich history as an industrialized, financial hub of the southeast, combined with its close proximity to an inter-regional and national freight network bringing goods to market offers a myriad of future opportunities for economic development and job growth. The Region includes 7,100 square miles and 1.127 million parcels of real estate. Cities and towns within its boundaries range from large metropolitan centers to rural crossroads. The Region's footprint represents a geographic area larger than the State of



Connecticut and was named the fastest urbanizing region over 1 million residents in the US in the last decade (2000-2010). Future growth projections by area transportation planning organizations indicate that the Region will nearly double in population by 2050.

Charlotte is now the 17th largest city in the United States, with a population of 775,202 as of the 2012 census. The Greater Charlotte Region contains 14 counties and 106 cities in both North and South Carolina, encompassing the 23rd largest metropolitan area in the country with a population of approximately 2.5 million. Charlotte's geographic location is desirable for residents, businesses, commerce and visitors as it is within two hours' flight time or one day's delivery time by motor freight of 60% of the U.S. population located along the I-85 "Piedmont Crescent" corridor from Atlanta to Washington, D.C.

The population boom within the Region has been fueled in great part by accelerated job growth in the financial, manufacturing and energy sectors over the past three decades. The Region is home to nine Fortune 500 firms and continues to attract corporate headquarters from throughout the world. Often referred to as the "New Energy Capital", the Greater Charlotte area has numerous businesses involved in the production of energy alternatives and identification of new and renewable energy resources. Charlotte also is the home of The University of North Carolina at Charlotte (UNC Charlotte) and its affiliated Energy Production and Infrastructure Center (EPIC), a highly collaborative industry/education partnership focused upon the advancement of energy technology through research and public/private partnerships.

Industry

Manufacturing, Logistics and Global Commerce are alive, strong and growing in the Greater Charlotte Region. New Geography recently ranked the Charlotte MSA as the 13th highest among the nation's 66 largest MSAs for manufacturing and North Carolina as the nation's ninth largest manufacturing state. The Region's Comprehensive Economic Development Strategy (CEDS) and Advanced Manufacturing research reports have identified over 1,200 firms specializing in sophisticated intelligent manufacturing, including energy, advanced materials, precision metrology, optoelectronic and biomedical technology located within the Region. These specialized firms have developed alongside 1,000-plus traditional manufacturing firms such as primary and fabricated metals, machinery, chemicals, plastics, electronics, transportation equipment, food and beverages. They range in size and assets from Fortune 500 companies to entrepreneurial start-up operations with considerable potential for long-term success.

Most of the Region's manufacturing firms are small or medium-sized businesses, positioned to benefit from agglomeration and cluster efficiencies if connected with available resources, especially global delivery systems. The Charlotte Foreign Trade Zone is one of the largest in the state, and the U.S. Export Assistance Center in Charlotte assists many local firms in navigating world trade issues. The Charlotte Chapter of the North Carolina World Trade Association is one of the largest in the nation. The Manufacturing Extension Partnership is active in Charlotte and throughout North Carolina.

Mobility Concerns

The Greater Charlotte urbanized area ranks as the 25th most congested in the country, according to the 2012 Urban Mobility Report. The average traveler encounters more than 40 hours of annual delay. Traffic congestion and mobility are projected to be problematic as the Region grows toward

the future – today, over 30% of regional workers must cross a county line to get to their jobs, an indication of the interconnectedness of the region’s communities. Sufficient state and regional transportation investments along “preferred growth corridors” lag significantly behind the rate of projected population increase, expected job growth and projected economic development opportunities.

Regional Freight Amenities and Considerations

The Region sits at the intersection of three interstate highways and six rail lines, providing excellent rail and truck distribution access in all directions. Sixty-two percent (62%) of the U.S. national industrial base and over 52% of the U.S. population is accessible within 650 miles of Charlotte, giving the Region a logistical advantage for business, particularly manufacturing and shipping industries. Each day a wide variety of products designed and manufactured in the Region are shipped to markets nationwide and globally around the world, utilizing convenient intermodal facilities and networks.

The Region’s interstate highway system is a desirable magnet for companies looking to ship goods quickly and easily. Interstate 77 runs north-south through Charlotte, connecting Miami to Cleveland, and Interstate 85 heads southwest to Atlanta and northeast to Washington, D.C. On the region’s northern border, Interstate 40 links the eastern United States to the western states. CSX and Norfolk Southern are the primary rail service providers in the region, but regional rail lines are also maintained by Alexander, Winston Salem Southbound, Lancaster & Chester and Aberdeen Carolina & Western railways. The Region is the center of the country’s largest consolidated rail system--Norfolk Southern and CSX link 43,200 miles of rail between Charlotte and 23 Eastern states.

According to Site Selection magazine, Charlotte ranks fifth in the nation for new and expanded distribution operations, with 192 facilities and serving as home base for distribution operations at such diverse companies as Family Dollar, Black & Decker, General Motors, Lucent Technologies and TJ Maxx. Charlotte is also the nation’s 12th largest trucking center, with more than 339 firms operating here and employing over 8,000 workers. More than 817 transportation and warehousing companies call “Charlotte USA” home.

Charlotte Douglas International Airport (CLT) connects the Carolinas to the world with more daily flights per capita than any other airport nationwide, including 36 international destinations daily, and is the sixth busiest airport in the world in total operations with 700 daily flights. It has a full complement of international service support organizations including U.S. Customs and Border Protection. The Charlotte Air Cargo Center consists of approximately 570,000 square feet of facilities and more than 50 acres of aircraft ramp space, handling over 134,300 tons of domestic and international cargo in 2010. It is served by 20 cargo airlines and 60 freight forwarders. Not surprisingly, the airport also is a major employment center with nearly 18,000 workers on site.

Co-located at the CLT airport, the Region’s recently constructed \$92 million Charlotte Intermodal Facility, privately built and operated by Norfolk-Southern Railway, is expected to generate over \$7 billion in regional economic impacts and create more than 7,000 jobs in the Region by 2030. The 200-acre facility has the capability to move 200,000 TEU per year, with parking for up to 1,331 trucks and potential for future expansion capacity on-site. The facility significantly expands capacity for distribution and the transfer of goods between rail, highways, air and connected seaports in Charleston, Savannah and Norfolk.

As the Region continues to expand and further develop, proper land use planning is one extremely critical factor in facilitating mobility for people and goods movement within and through the area. Businesses and industry must be able to locate in areas that provide them with uninterrupted logistics, options for delivering and receiving goods and viable ways in which to access a trained, educated workforce. Without sufficient mobility and accessibility, the Region cannot sustain the forecast demand of economic growth, businesses and manufacturers will be unable to move supplies and employees in and goods out.

Additional Background Resources

A number of initiatives have been previously conducted within the past several years that provide related background and information for proposers. A brief list of pertinent regional studies and plans that may be of interest include:

- **CONNECT Our Future Regional Growth Framework/HUD Sustainable Community Regional Planning Grant (2012-2015)** <http://www.connectourfuture.org>.
- **Governor Pat McCrory's NC Vision25, Vision for North Carolina, Mapping Our Future (December 2014)** <http://www.ncdot.gov/ncvision25/>
- **Charlotte Regional Planning Transportation Organization (CRPTO) 2040 Metropolitan Transportation Plan, Chapter 17** http://crtpo.org/PDFs/MTP/2040/Report/Ch17_Freight.pdf
- **Gaston-Cleveland-Lincoln MPO metropolitan Transportation Plan, Chapter 13** <http://www.gclmpo.org/documents/MTP2040CHAPTER13.pdf>
- **Rock Hill – Fort Mill Area Transportation Study (RFATS) Long-Range Transportation Plan, Chapter 7** http://www.rfatsmpo.org/images/stories/PDF/2035_LRTP_Update/ch7_freight_element-final.pdf
- **Investing in Manufacturing Communities Partnership (IMCP) Strategic Planning Grant (2013).** <http://www.ProspertyForGreaterCharlotte.com>.
- **Comprehensive Economic Development Strategy and Jobs, Workforce, Education Alignment Study (2012)** <http://www.centralinaedc.org/CEDS.php>
- **Centralina Council of Governments (CCOG) Regional Freight Mobility Scoping Process (2011-2012).** More information about the Region's previous freight mobility study scoping efforts can be found at: <http://www.centralina.org/wp-content/uploads/2014/04/Freight-Mobility-Plan-Power-Point-April-2012.ppt>.
- **NCDOT Seven Portals Study Final Report (Charlotte Region) (2011).** <http://www.ncdot.gov/doh/preconstruct/tpb/research/download/2010-34-0masterfinalreport.pdf>
- **Transportation Planning in the Greater Charlotte Region (2009).** http://www.crtpo.org/PDFs/Orientation/Expansion_Governance.pdf
- **NCDOT North Carolina State Rail Plan (2009)** <http://www.ncbytrain.org/projects/rail-plan.html>
- **North Carolina Statewide Logistics Plan (2008)** http://www.ncdot.gov/download/business/committees/logistics/StatewideLogisticsPlan_080513.pdf
- **SCDOT 2040 South Carolina Statewide Multimodal Transportation Plan** http://www.scdot.org/doing/publications_multimodal.aspx

III. SCOPE OF WORK

Centralina Council of Governments (CCOG) intends to hire a qualified consultant or team to prepare a Greater Charlotte Regional Freight Mobility Plan that delivers the outcomes expected to result from successful completion of the project.

The successful responder must demonstrate significant freight operational planning expertise, a strong knowledge of federal, state and regional requirements and technical economic development and land use strategic planning capabilities for the preparation of a comprehensive and strategic Greater Charlotte Regional Freight Mobility Plan. The expected deliverable for this project is a comprehensive regional plan that provides project partners (public and private) with a series of short-term and long-term strategies and guidance for strategic processes and policies to guide future investments to facilitate the mobility of truck and rail freight movements within and through the Greater Charlotte Region.

The Greater Charlotte Regional Freight Plan is an important product that ties together findings from a series of significant regional studies and projects over the past decade. It is expected that the Greater Charlotte Regional Freight Mobility Plan will guide project partners and stakeholders (public and private) in the development of a staged, priority-driven technical process to address future regional freight (primarily truck and rail) processes, policies and investments.

A significant amount of analysis work is expected to be undertaken as part of this process, along with the identification of best practices from other regions around the country with similar logistic, economic and land use attributes and environments. The selected consultant/team will play a very important role in aligning previous comprehensive regional planning findings in order to prepare a comprehensive Regional Freight Mobility Plan that is consistent with regional goals and objectives. The Greater Charlotte Regional Freight Plan must take into account the projected future growth of the Greater Charlotte area, key economic variables that are driving regional freight land use, job growth and workforce development scenarios, and potential Federal MAP-21 requirements and Statewide Strategic Rail Plans for performance measurement strategies and freight sector investments. The Greater Charlotte Regional Freight Mobility Plan must include a set of strategies to guide state, regional and local agencies in the implementation of Greater Charlotte Regional Freight Mobility Plan findings and recommendations in both the short (3 to 5 year) and long term (6-25 years).

Public Participation in This Study

The CCOG and project stakeholders have identified the need for a significant degree of public participation within the Greater Charlotte Regional Freight Mobility Plan development phase. Responders to this RFP should specifically address how (type of involvement) and when (which tasks and frequency of meetings) they plan to involve various stakeholders within the proposed work plan, including identification of any tasks or activities that require the participation of Project Steering Committee members (Greater Charlotte regional policymakers, elected officials and staff), Advisory Committee members (Key private sector freight, logistics and manufacturing representatives in the region), and the general public. It is anticipated that CCOG staff will lead and schedule public participation activities as necessary throughout the project with selected direction, support and assistance from the selected Consultant as appropriate. ***The proposal should identify key engagement strategies for each of the following tasks, where applicable, to ensure we have a robust bottom-up approach to this planning process.***

Project Scope of Work

Pre-Project Phase (Tasks are Responsibility of CCOG and Project Partners)

January - March 2015

- Identification/Assignment of Agency, Partners, Budget, Staffing and Resource Requirements
- Project Steering Committee Development (Policymakers, Agencies)
- Project Freight Advisory Committee Development (Private Sector)
- RFP Development and Release/Notice to Public and Interested Parties
- Selection of Preferred Responder and Contract Process
- Contract Approval/Project Kick-Off

Plan Development Phase (Consultant Tasks)

Task 1: Analysis of Existing Conditions for Truck and Rail Freight Mobility in Region

Truck

- 1.1 Truck Freight Bottleneck Analysis-Interstate and Major Regional Routes**
- 1.2 Truck Origin/Destination Analysis and Identification of Critical Freight Corridors**
- 1.3 Truck Network Identification**
- 1.4 Truck Freight Economic Impact Analysis**
- 1.5 Truck Parking Facility/Utilization Rate Analysis**

Rail

- 1.6 Overview of Rail Freight System and Identification of Key Corridors and Facilities**
- 1.7 Existing Freight Rail System Bottlenecks and Constraints**
- 1.8 Existing Commodity Freight Flow and Train Volume Analysis**
- 1.9 Rail Freight Economic Impact Analysis**

Task 1 activities are focused upon the conducting of a thorough analysis of current conditions and operations related to truck and rail freight commodity flows within and through the Greater Charlotte Region. The Consultant should provide a detailed description of the process they are proposing to conduct the analyses, including national, regional or state data sources or other information that will be used to thoroughly develop the existing conditions assessment. A detailed freight economic impact analysis focused upon regional truck and rail freight activity in both urban and rural areas of the Greater Charlotte Region is the key deliverable under this task.

Task 2: Land Use, Facility, Infrastructure and Regulatory Gap/Future Demand Analysis

- 2.1 Inventory of Existing Regional Freight/Intermodal Land Use**
- 2.2 Regional Freight Land Use Policies and Regulations**
- 2.3 Intermodal and Truck Parking Facility Capacity**
- 2.4 Road Network Corridors (Interstate and Local)**
- 2.5 Rail Network Corridors (Dedicated and Shared Use)**

The Consultant must conduct a gap analysis under Task 2 that analyzes and evaluates existing and planned freight-related land uses, including facilities and infrastructure, within the Region. Recommendations and findings from the gap analysis should be integrated into regional preferred

growth scenarios developed and approved through the CONNECT OUR FUTURE project process recently completed by CCOG. The expected outcome resulting from the gap analysis task is a GIS-based map identifying areas and facilities within the region that are critical to ensuring efficient freight flows and mobility in the future.

As part of this task, the consultant will conduct a review of local unit of government development policies and processes that may impact the efficient delivery of goods by truck and rail in both the short and long term. Tools and strategies that assist regional policymakers and agencies in the development of freight land use policies and regulations consistent with future Preferred Growth and economic development scenarios should be included. In addition, Federal and state regulations that may impact or affect proposed local development policy and process changes should be identified.

Task 3: Best Practices in Freight Mobility Efficiency, Safety and Technology (ITS)

- 3.1 Peer Review of National Freight Mobility Plan 'Best Practices' Models**
- 3.2 Future Technology Trends and Applications**
- 3.3 Freight Safety and Security Features**
- 3.4 Opportunities for Public/Private Partnerships**

A peer review of 2-3 similarly-sized regional models of freight mobility best practices in industry and government should be conducted for Task 3. This deliverable should identify best practices in the areas of modal technology trends and applications utilized by the private sector to improve freight throughput and increase efficiencies, land use, regulatory and planning practices. For comparative purposes, the review should include regions with similar geographic attributes as Greater Charlotte and focus on practices to attract private industry, improve commodity flow and provide regional economic benefits. In accordance with preliminary MAP-21 guidance, applicable Industry technological improvements in the areas of Intelligent Transportation Systems (ITS), safety and security should also be identified, as well as potential opportunities for public/private partnerships and initiatives within the Greater Charlotte Region based on study findings.

Task 4: Prioritize List of Regional Needs

- 4.1 Prioritize List of Regional Needs (for inclusion in CTP, MTP and STIP processes)**

The critical regional deliverable resulting from findings in previous tasks of the study is a staged, prioritized list of freight infrastructure, process and policy needs for use by Greater Charlotte agencies. A staged, prioritized list of regional freight mobility needs approved by the Project Steering Committee is the expected outcome of this task. The list shall include recommendations for policies and projects (infrastructure, safety improvements, etc.) for inclusion within regional planning processes such as the CTP, MTP and ultimately the NC/SC State Transportation Improvement Plans (STIP). Recommended needs should be identified as either a short-term (3-5 year) or long-term (6-25 years) action based on a determination by the Consultant gained from study findings, stakeholder inputs and regional assessments.

Task 5: Develop Regional Freight Performance Measures in Accordance with USDOT/MAP-21 Recommendations and State Strategic Freight Plan Requirements

- 5.1 Determine Quantitative Metrics to Support MAP-21 and NCDOT Requirements**

5.2 Define Regional Quantitative Data Collection Processes and Partner Responsibilities

Under Task 5, the Consultant must develop a targeted, quantitative set of regional freight performance measures and metrics that closely follow preliminary guidance resulting from the MAP-21/National Freight Strategic Plan development process and which address regional transportation that support regional economic development goals. While it is understood that final guidance and recommendations from the USDOT MAP-21 process will not be issued until Fall 2015, preliminary guidance suggests data and tools that support outcome-oriented, performance-based evaluations will need to be developed for use in developing future Statewide Strategic Freight Plans and for the assignment of federal funding priorities in the freight sector. Based on information collected and analyzed from previous tasks, it is expected that the Consultant will identify specific quantitative/metric-gathering processes and assignments that regional partners, public and private, can undertake in the future to ensure that freight performance data collected within the Greater Charlotte Region is responsive to both federal/state requirements and regional economic development goals.

Task 6: Develop Draft and Final Greater Charlotte Freight Mobility Plan Report

6.1 Develop Draft Plan/Report with Findings and Recommendations

6.2 Present Draft to Project Steering Committee for Review/Comment

6.3 Present Draft at Public Meetings for Review/Comment

6.4 Submit Final Report incorporating comments to CCOG

A Draft Regional Freight Plan will be developed that includes a detailed discussion of activities performed during the project, outcomes resulting from the project's tasks and activities, and a thorough analysis of project findings. The Draft Plan document must include recommendations and strategies for short and long term regional priorities to improve truck and rail freight mobility in the Greater Charlotte Region. The Consultant will present the Draft Regional Freight Mobility Plan for Project Steering Committee review and approval no later than December 1, 2016. Once the Draft Mobility Plan has been approved by the Project Steering Committee, a Final Greater Charlotte Regional Freight Mobility Plan document must be submitted to CCOG no later than December 15, 2016.

Post-Project Phase (Tasks are Responsibility of CCOG and Project Partners with limited participation of Consultant as necessary)

November-December 2016

- Plan Formally Presented to Local Government Partners for Endorsement/Approval
- Targeted Individual Briefings As Required
- Project Close-Out
- Incorporation of Approved Plan Elements into Regional/State Plans and Processes

IV. PROPOSAL STRUCTURE

The proposal must address all elements of the scope of work as outlined within the section below. Any modifications or enhancements proposed beyond the identified scope of work outlined within this document must be clearly and concisely identified, including providing separate cost detail for each.

*Greater Charlotte Regional Freight Mobility Plan RFP
January 2015*

Greater Charlotte Freight Mobility Plan Proposal Format

The proposal cannot exceed 20 pages (either 20 single-sided pages or 10 double-sided pages) in length. The proposal title page is NOT counted within the 20 page limit. Please use 11 or larger point font size for readability. Any text beyond 20 pages will not be reviewed. Appendices are not allowed and will not be reviewed. Proposals should demonstrate that the responder fully understands the intent of the project, the character of the required deliverables and the plan development process. In addition, the level of technical qualifications to supply the required services must be clearly demonstrated. In order to assist in the evaluation process, please include the following requirements in the proposal document:

- **Cover Letter** (no more than one (1) page and counts within 20 page limit)
The letter must be signed in ink by an individual with authority to legally represent the proposer to the work proposed by the company or team.

- **Project Approach/Work Plan**
This section should include a detailed description of the proposer's understanding of the intent of the project and its objectives, the character of the required deliverables, and overall approach to the project. The proposer should identify the level of assistance required from the CCOG and/or Project Partners to complete each task.

- **A schedule (in Gantt chart form) showing all milestones, critical stakeholder meetings and deliverables to maintain project progress by the project end date.**

- **Introduction to the Proposer(s)**
Firms shall provide the following information. (The same information must be provided for each sub-consultant or each member of a joint venture):
 - Firm name and business address, including telephone number and email contact.
 - History of the firm.
 - Identify the state in which the firm was organized or incorporated.
 - a. Type of ownership, and name and location of parent company and subsidiaries, if any.
 - b. Number of full-time employees. Part-time employees or consultants routinely engaged by the Consultant may be included, if clearly identified as such.

- **Qualifications and Experience of the Consultant Firm(s)**
Please describe recent experience relevant to this project. Include brief project profiles with total project cost as well as a key project reference with address, phone and email contact information for each profile. Particular emphasis should be placed on projects managed by the key personnel proposed for this project. If the respondent anticipates the use of sub-consultants, the respondent shall identify:
 - The role and extent to which these parties will participate in the project.
 - The means by which the Consultant will oversee the work of these parties.
 - The experience and credentials of these parties relevant to this project.
 - References: Please submit names, addresses, and phone numbers of at least two references familiar with the sub-consultant's ability, experience, and reliability in the performance and management of projects of a similar nature.

- **Qualifications and Experience of Key Staff**

Identify key individuals to be assigned to this project and include the function and/or responsibility of each of the identified individuals. Experience summaries of these key individuals shall be provided, with emphasis on previous experience on similar projects in similar roles. Resumes of these key individuals may be included within the 20 page limit if desired.

If any of the above requirements are not met, the responder's proposal may not be considered.

Project Cost Estimate (No more than 2 pages, ***EXCLUDED*** from the 20 page proposal limit)

The CCOG requests a detailed cost estimate for the work to be completed based on the information provided by responders. This estimate is **non-binding and for informational purposes only, and is not part of the selection criteria**. The cost estimate is excluded from the 20 page proposal document page limit requirement and should be presented in a tabular or spreadsheet format that includes the proposer's name and contact information. Cost estimate information is to be packaged as a separate document from the main proposal and included within the same mailing package when submitted to CCOG. The project cost estimate document should be attached as separate electronic document (PDF) along with the proposal document as it is submitted electronically to the CCOG Project Manager.

The project budget and the final project scope of work may be modified prior to final project award and/or contract negotiations. Responders are encouraged to propose additional tasks or work within the proposal document if it enhances final project products and outcomes. These tasks must be clearly labeled as an enhancement or modification of the RFP scope of work and costs for proposed changes to the RFP scope of work must be included and labeled as such in the submitted project cost estimate. The responder must submit an itemized estimate of direct expenses (labor hours by task and person/overhead/fee, including use of subcontractor personnel) and expected indirect expenses (travel/supply/other) for a total not-to-exceed project cost. Reimbursable (indirect) expenses allowable under this project may include, but are not limited to, the following:

Reimbursable (Indirect) Expenses

- Air travel, not to exceed the coach class rate.
- Auto rentals, while in the region, not to exceed standard/midsize car class, nor exceed one auto for every three (3) consultant employees on site.
- Lodging and meals not to exceed the Domestic Per Diem rates listed in the current edition Appendix "A" of Chapter 301 of the Federal Travel Regulations.
- Use of a private vehicle for project-related duties shall be reimbursed at the published IRS standard mileage rate.
- Courier services
- Facsimile and photocopies (should include a not-to-exceed charge per item)
- Long distance and conference telephone charges
- Printing charges incurred on behalf of the CCOG

Non-Reimbursable Expenses:

- Consultant travel time from point of departure to the Charlotte project destination
- Alcoholic Beverages

- Maintenance or repair expenses to consultant's vehicle
- Tips (except what is allowed under meal & incidental expenses)
- Incidental expenses (laundry, dry cleaning) beyond what is allowed under meal & incidental expenses)
- Personal expenses (movies, phone, entertainment, etc.)
- Towing, parking violation, traffic tickets, etc. incurred while traveling
- Flight or travel insurance
- Expenses for lodging at facilities that are not licensed as a hotel or motel
- Expenses that are usually and customarily included as part of the consultant's overhead such as typing, utilization of computer systems, cameras, recording or measuring devices, flashlights and other small portable equipment, safety supplies, phones, expendable office supplies, etc.
- Administrative fees for time spent in making travel arrangements, obtaining receipts and billing the CCOG for reimbursable expenses.

Submittal Instructions

Submit five (5) hard copies of the RFP response (and separate cost detail) and **one (1) digital copy** (and separate cost detail) that exactly matches the hard copies submitted. **The digital copies should be saved as Adobe PDF files (reduced size) and e-mailed to snepal@centralina.org by the proposal deadline date and time.** Number all pages consecutively. Clearly indicate the following on the outside of each proposal submittal package:

- Project name (Greater Charlotte Regional Freight Plan);
- Name, address, and email address of the primary consultant.

Submissions must be received by **4:30 pm EST on February 27, 2015** at:

Centralina Council of Governments (CCOG)
 Attn: Sushil Nepal, Project Manager
 525 North Tryon Street, 12th Floor
 Charlotte, North Carolina 28202

V. PROJECT SCHEDULE

A copy of the CCOG current draft schedule (subject to change) is included below for planning purposes.

Task	Timeline/Deadline
Request for Proposals Advertised	January 23, 2015
RFP (Written Only) Questions Accepted	February 10, 2015 by 4:30 pm EST
RFP Answers Posted on CCOG website	February 16, 2015 by 4:30 pm EST
Proposal and Cost Estimate Submittal	February 27, 2015 by 4:30 pm EST
Review Team Evaluation	Week of March 2, 2015
Consultant Interviews (<i>In-person, conference call, Skype, etc.</i>)	Week of March 9, 2015
Consultant Selection and Notification	Week of March 9, 2015
Post Selection Meeting with Consultant	Week of March 9, 2015 – March 16, 2015
CCOG/Consultant Contract Negotiations	By March 27, 2015

Award of Contract or Letter of Intent
Anticipated Services Begin

By March 27, 2015
April 1, 2015

Post Selection Meeting

It is anticipated that the submitted qualifications may not clearly establish all related tasks and respective responsible parties. Therefore, closely following proposer selection, CCOG staff will meet with the selected proposer to revise or amend as necessary the final scope of work, and more precisely define work tasks, responsibilities of parties, deliverable dates (including a consultant-led project kick-off meeting with the Steering and Advisory Committees in attendance), project schedule requirements and final project cost.

VI. CONSULTANT SELECTION PROCESS

The CCOG evaluation process will involve review of each submitted proposal by deadline date and time by the project selection committee based on the criteria outlined below. A list of responders will be developed in order of preference based on proposal content and, if desired by the selection committee, a check of references may be performed. The proposal evaluation criteria, with corresponding weight factors, consist of the following:

- Demonstrated experience in creating regional or state freight plans, working with a diverse groups of stakeholders and ability to prepare user-friendly planning products (written reports and web-based reports) (35 percent)
- Qualifications of the firm and personnel (including any subcontractors) to be assigned to this project demonstrating the Consultant's capacity to complete requested services, their experience completing similar projects, including experience with data collection and analysis related to the scope of work elements. (35 percent)
- Demonstration of overall project understanding and clarity of the proposal and creativity/thoroughness in addressing the project objectives and deliverables outlined in the RFP. (15 percent)
- Completeness of submitted Proposal and Cost Estimate documents with all elements required by the RFP and Demonstrated effort to solicit/include Disadvantaged Business Enterprise (DBEs), Minority Business (10 percent)
- References to previous similar work, including work performed such as regional freight/logistics studies, intermodal or logistics planning, or truck and/or rail planning. (5 percent)

The CCOG reserves the right to seek clarification of any submitted proposal, reject any and all proposals received as a result of this solicitation, to negotiate with any qualified source, to waive any formality and any technicalities or to cancel in part or in its entirety this RFP if it is in the best interests of the CCOG. This solicitation of qualifications in no way obligates the CCOG to award a contract. A short list of qualified consultants will be selected from the submitted proposals for follow-up interviews. The interview format will include an oral presentation from the Consultant, to be followed by a question and answer period. Interviews will be scheduled during the week of March 9, 2015 at the Centralina Council of Governments (CCOG) offices. Skype or an equivalent

platform for interviews may be considered depending upon circumstances.

VII. ADDITIONAL INFORMATION

The CCOG reserves the right to award the contract to any qualified responder. This solicitation in no way obligates the CCOG to award a contract. Ten percent (10%) of total contract cost will be withheld as retainage pending successful project completion. All submittals become the property of the CCOG upon submission. The cost of preparing, submitting and presenting qualifications lies solely with the responder.

All data, databases, reports, designs and materials in digital and hard copy format created under this project shall be transferred to the CCOG upon completion of the project and become the property of the CCOG.

Questions regarding this RFP should be directed to Sushil Nepal, Centralina Council of Governments (CCOG) at (704) 348-2701 or snepal@centralina.org. The CCOG will maintain a list of questions and answers on its website (<http://www.centralina.org>). **Questions will be accepted until 4:30 pm EST on February 10, 2015 and answers will be posted by 4:30 pm EST on February 15, 2015.**