

Request for Proposals (RFP)

Non-A&E Services

Issued by: Lane Council of Governments (herein after referred to as “Agency”)

RFP Number: 2021-0001

RFP Title: Oregon Household Activity Survey

Issue Date: February 18, 2021

PROPOSAL CLOSING: March 31, 2021 by 2:00 PM Pacific Time

Proposer Questions, RFP Protests, and Requests for Change: due via email no later than 7 calendar days prior to Proposal Closing.

A pre-Proposal conference is scheduled on March 9, 2021 at 1:00 p.m. PST, to be held virtually from this link:

<https://zoom.us/j/98580005097?pwd=SFNGdDJwK0R1SE5MVjZHbkp3ZnVldz09>

Attendance is not mandatory. The purpose of the conference is to provide additional information regarding this solicitation and to answer any questions Proposers may have. Proposers are cautioned that the official RFP requirements will change only by written addenda issued by Agency.

Issuing Office / Single Point of Contact (SPC)

Single Point of Contact for this RFP:	Elena Kuhnhenh, Senior Financial Analyst
Address:	Lane Council of Governments 859 Willamette St, Suite 500 Eugene, OR 97401
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Proposals must be submitted to the above email address.
(See submittal requirements in [RFP section 2.4](#))

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Definition of Terms:

The following terms have the meaning provided in [OAR 125-246-0110](#): “Addendum” or “Addenda”, “Award”, “Business Day”, “Closing”, “Contract”, “OAR”, “ORS”, “Proposal”, “Request for Proposal” or “RFP”, “Responsible”, “Responsible Proposer”, “Responsive”, “Solicitation”, “Writing”.

1.0 SOLICITATION PURPOSE & CONTRACT OVERVIEW

1.1. SUMMARY OVERVIEW & PROCUREMENT SCHEDULE

Agency is issuing this Request for Proposals and any Addenda thereto (collectively, the “RFP”) to obtain Proposals from qualified consultant(s) for services (“Services”). For further information regarding the Services needed, see sections 1.2 through 1.10 and Attachment B.

Proposers responding to this RFP do so solely at their expense, and Agency is not responsible for any Proposer expenses associated with the RFP.

Procurement Schedule	Date or Number of Days
RFP Issue Date, Pre-Proposal Conference, Deadline for Proposer Questions/Protests, Proposal Closing	Dates stated on front page
Completion of Proposal evaluation	Est. 14 calendar days after Closing
Completion of interviews or follow-up questions (if conducted)	Est. 24 calendar days after Closing
Notice of intent to award	Est. 3 Business Days after all scoring complete
* Negotiations completed	Est. 40 calendar days after intent to award
Contract Start	Est. within 14 calendar days of negotiation completion

*** Proposer, by submitting a Proposal, commits to and will be expected to make best efforts to accommodate the negotiation schedule above if selected for intent to award. See Section 5 Negotiations.**

1.2. PROJECT BACKGROUND, LOCATION, and SCOPE of NEEDED SERVICES

The statement of work (SOW) will be developed and negotiated, within the scope advertised in this RFP, with the apparent successful Proposer for inclusion in the Contract. A draft SOW is provided in RFP Attachment B, which will be negotiated with the apparent successful Proposer for inclusion in the Contract.

Lane Council of Governments (herein after referred to as “Agency”) is inviting Proposals for the Oregon Household Activity Survey, a collaborative and coordinated multi-agency effort. Transportation analysts, planners and decision-makers rely on periodic travel surveys to provide a “snapshot” of current household travel behavior. The data collected through household travel survey efforts are also critical for updating and improving travel demand models, the foundational analytical tool used to support transportation planning, as they provide a comprehensive picture of personal travel behavior that is lacking in other data sources.

Because household demographics and travel behavior can change significantly over time, the various agencies responsible for transportation planning throughout Oregon have traditionally conducted travel survey efforts approximately every 10 years. The most recent household travel survey effort in Oregon was conducted from 2009 to 2011. The Oregon Department of Transportation (“ODOT”), the 8 Metropolitan Planning Organizations (“MPO”) across Oregon, and the Southwest Washington Regional Transportation Council (“RTC”) have begun to plan for the next household travel survey effort. The survey data will be critical for policy- and decision-makers across the State. It will also be used to further the development of a variety of MPO and statewide trip-based and activity-based travel models throughout Oregon, including models in the Portland/Vancouver, WA area and other Oregon metropolitan and non-metropolitan areas, and to further the development of integrated land use-economic-transportation models being developed by ODOT.

The Oregon Modeling Steering Committee (“OMSC”) is a collaborative forum that promotes coordination and knowledge/information sharing across the many agencies that are responsible for travel modeling

within Oregon and Southwest Washington. The OMSC's mission is to ensure that transportation agency partners around the state continue to have the right analytical tools, and the skills and expertise needed to help answer important planning and policy questions about Oregon's transportation system, growth and development, and its economy. A subcommittee of the OMSC, the Travel Survey Subcommittee ("TSS"), has been established to develop strategies for collecting the travel behavior data needed for travel modeling at city, regional and statewide levels. TSS will serve as the central forum for inter-agency coordination during survey planning and implementation.

In 2018, TSS met several times to learn about recent advances in travel survey approaches and methodologies. During this background information gathering phase, TSS also heard from several peer MPOs, state departments of transportation, and national consultants as to how coordinated statewide survey efforts are currently being implemented. Given the resource-intensive nature of large-scale statewide household travel survey efforts and the rapidly evolving transportation landscape, TSS is especially interested in developing a financially sustainable approach for the Oregon modeling community that provides opportunities for more frequent surveys rather than a single large survey program at 10-year intervals. TSS is also interested in leveraging modern data collection methods and new technologies to enhance the efficiency of both survey design and implementation.

The purpose of this Request for Proposals ("RFP") is to solicit consultant Proposals for:

- Phase I - Scoping. This Phase includes evaluating and documenting best practices, methodologies and strategies for implementing a statewide household survey.
- Phase II - Survey Design. This Phase includes developing the design, methodology and cost for implementing a statewide household survey.
- Phase III - Implementation. This Phase includes implementation of the Statewide survey in accordance with the Phase II Survey Design as approved by the Agency.

Phases I and II will be conducted over a 10-month timeframe during 2021-2022. Phase III will be conducted over a 24-month timeframe during 2022-2024.

General Expectation. Consultant commits to provide, oversee and direct Services herein to obtain the greatest long-term value for the government, and to promote prudent expenditure of public funds within the constraints of the project, program, context, budget and cost-effective sustainability principles. Consultant shall: (i) avoid expenditures for aesthetic effect which are disproportionate to the project as a whole; (ii) use recycled/recyclable products to the maximum extent economically feasible in the performance of this Contract, and (iii) apprise Agency throughout the project concerning any issues or decisions with potential economic impact to the project.

1.3. PROJECT PHASES

If a contract is awarded, Agency anticipates the contracted Services will be performed in the following three phases:

- Phase I - Scoping. This Phase includes evaluating and documenting best practices, methodologies and strategies for implementing a statewide household survey.
- Phase II - Survey Design. This Phase includes developing the design, methodology and cost for implementing a statewide household survey.
- Phase III - Implementation. This Phase includes implementation of the Statewide survey in accordance with the Phase II Survey Design as approved by the Agency.

1.4. PERIOD OF PERFORMANCE

The schedule for performance of Phases I and II Services under the prospective contract extends approximately 10 months (June 2021 to March 2022). The schedule for performance of Phase III Services, if awarded under the prospective contract, extends 24 months (June 2022 to June 2024).

1.5. QUANTITY OF CONTRACTS AWARDED & OFFER PERIOD

It is anticipated that 1 Contract will be Awarded from this RFP (if Agency makes an Award). A Proposer's Proposal is a firm offer, irrevocable, valid and binding on the Proposer for not less than 180 days following the Closing date for this RFP. Agency may request, either orally or in Writing, that Proposer extend the offer period in Writing.

1.6. FUNDING SOURCE(S):

This procurement includes funding from Federal Highway Administration (FHWA) and local sources.

1.7. CONTRACT NOT TO EXCEED AMOUNT & METHOD OF COMPENSATION

The anticipated initial value of the contract (**total for Phases I and II**) awarded from this RFP is estimated to be **in the range of \$175,000 to \$200,000**.

Contingent upon Agency's need, Consultant's performance, and the availability of approved funding, Agency anticipates amending the contract to add Phase III Services. Based upon the deliverables of Phases I and II, the statement of work and dollar amount for Phase III will be negotiated within the scope advertised in the RFP. **The total not to exceed amount of the contract for all three Phases of Services, including any amendments, will not exceed \$5,000,000.**

The method of compensation will be determined by Agency and may be any of the following methods (may include more than one method - "Mixed"):

- Time and Materials, up to a maximum NTE amount;
- Fixed Price for all Services;
- Fixed Price per Deliverable;
- Fixed Price per Milestone.

1.8. DISADVANTAGED BUSINESS ENTERPRISE ("DBE") PARTICIPATION

ODOT's DBE Policy Statement is posted at the following Internet address:

<https://www.oregon.gov/ODOT/Business/OCR/Pages/Disadvantaged-Business-Enterprise.aspx>

The DBE Policy Statement applies and is incorporated with the same force and effect as though fully set forth in this RFP.

No Goal. A DBE Participation Goal has not been established for this procurement. See RFP Attachment C - Sample Contract, Exhibit E for information on reporting requirements and how credit for DBE participation is determined for no-goal contracts.

1.9. INSURANCE REQUIREMENTS

See Exhibit C of the Sample Contract (RFP Attachment C) for the insurance requirements that will apply to the prospective contract from this RFP.

1.10. CONTRACT TERMS & CONDITIONS

See RFP Attachment C - Sample Contract, which is incorporated in the RFP by this reference, for the terms and conditions that will apply to the prospective contract from this RFP. Unless an official Addendum has modified or reserved the right to negotiate any terms and conditions contained in the Sample Contract or exhibits thereto, Agency will not negotiate any term or condition after the solicitation protest deadline, except the SOW and pricing with the apparent successful Proposer(s). Changes to standard contract terms and conditions may be subject to approval by ODOT.

By Proposal submittal, the apparent successful Proposer agrees to be bound by the terms and conditions as set out in the Sample Contract associated with this RFP, and as they may have been modified or

reserved by Agency for negotiation. **Any Proposal that is received conditioned on Agency's acceptance of any other terms and conditions or rights to negotiate will be rejected.**

2.0 INSTRUCTIONS TO PROPOSERS & SUBMITTAL REQUIREMENTS

2.1 PROPOSER QUESTIONS, RFP PROTESTS and REQUESTS FOR CHANGE

All questions, RFP protests or requests for change relating to any aspect of this RFP or the associated Project must be submitted in Writing via e-mail to the SPC identified on page 1 of this RFP. RFP protests and requests for change submitted after the protest due date on page 1 of this RFP will not be considered. RFP protests or requests for change must be in conformance with requirements set forth in **ORS 279B.405**. The foregoing procedures and deadline shall also apply to protests and requests for change respecting the contents of Addenda to the RFP, unless the Addenda specify a different deadline. **Failing to follow the foregoing requirements regarding the Single Point of Contact for inquiries may result in Proposal rejection by Agency.**

Answers to substantive questions and/or any changes to the RFP will be issued as official Addenda to this RFP, no later than 7 calendar days prior to the Proposal Closing.

2.2. ADDENDA

Changes or modifications to this RFP shall be binding on Agency only if in the form of written Addenda to the RFP issued by Agency. Except for officially issued Addenda, no person has been authorized to provide any other written or oral representation, clarification, warranty or assurance with respect to this RFP or the Project.

Agency shall advertise and make Addenda, if any, available at the following website:

<https://www.lcog.org/1127/8210/OHAS-RFP>. Potential Proposers who have downloaded or received a copy of this RFP will only be alerted to the existence of any Addenda by monitoring and downloading Addenda from the above website, or by checking with the SPC for this RFP. Agency is not responsible to notify potential Proposers of Addenda, nor will it send Addenda to any potential Proposer. Receipt of Addenda must be acknowledged in submitted Proposals.

2.3. MINIMUM QUALIFICATIONS

2.3.1 [RESERVED].

2.3.2 References. Proposers must have completed at least 2 projects similar in nature to the Services described in this RFP in the last 5 years. Provide references for the similar work in the fields provided on the Proposal Coversheet - RFP Attachment A.

2.3.3 Experience. Proposers shall have demonstrated experience in the following areas:

2.3.3.1 Designing household activity surveys, especially those with the purpose of data collection for travel demand modeling, including specialized surveys such as recreational or seasonal travel, colleges/universities, hard-to-reach populations, other special markets and panel surveys.

2.3.3.2 Location data collection strategies associated with travel surveys, including data processing techniques that make useable data available in a timely manner.

2.3.3.3 Developing sampling strategies for a large geographic area, such as a state or large county that requires geographic stratification.

2.3.3.4 Leveraging information from the National Household Travel Survey and other data sources to help reduce state and regional-level data collection efforts.

2.3.3.5 Identifying successful survey participant recruitment strategies, including strategies to reduce the respondent burden.

- 2.3.3.6 Inter-agency coordination and facilitation, including working with a large stakeholder committee to determine appropriate methodologies and address varying survey needs by agency and/or geography.
- 2.3.3.7 Experience evaluating the suitability of emerging synthetic data opportunities for supplementing or supplanting data collection efforts is desired.
- 2.3.3.8 Experience preparing reports or visuals to communicate survey results.
- 2.3.3.9 Survey Implementation shall demonstrate experience in all areas above, and have these additional qualifications:
- 2.3.3.10 Demonstrated experience and staff capacity to successfully implement and manage concurrent data collection programs for multiple agencies and geographies.
- 2.3.3.11 Experience with methods to expedite the data cleaning process and weighting in order to provide analysis-ready data.
- 2.3.3.12 Experience coordinating surveys over a multi-year timeframe to accommodate stakeholder agency funding availability.

2.4. PROPOSAL & SUBMITTAL REQUIREMENTS

2.4.1 Time, Date and Place for Submission. Proposals and all required submittal items must be received by the submittal deadline and at the email set forth on page 1 of this RFP. Proposer is solely responsible for ensuring its Proposal is received by Agency in accordance with the RFP requirements before Closing. Agency is not responsible for any common transmission errors or delays, or for any mis-delivery for any reason. Agency will not accept Proposals submitted after the Proposal submittal deadline. A Proposal may be withdrawn or replaced with a modified Proposal by written request from an authorized representative of Proposer, provided the request (and any modified Proposal) is received prior to the deadline for Proposal submittal.

In the event of a failure of an Electronic Procurement System or electronic mail system that interferes with the ability of Proposer to submit Electronic Submittals, to protest or to otherwise participate in the procurement, ODOT may cancel the procurement or may extend the date and time of receipt of Electronic Submittals by providing notice of the extension immediately after the Electronic Procurement System or electronic mail system becomes available.

2.4.2 Technical Proposal Page Limit, Font Size. The Technical Proposal is limited to **15 pages** and must use a minimum **12 point font** for substantive text (including text in tables or resumes, if any). Any pages exceeding this limit will not be provided to the evaluation committee or considered in the evaluation. One page is defined as: one side of any 8-1/2" x 11" page, partial page, tab, index or table of contents with substantive text, tables, graphics, charts, resumes, etc. Any page over this size will be counted as 2 pages.

The following items do not count toward the page limit:

- Attachment A - Proposal Cover Sheet,
- Pricing information required in section 2.4.5.
- Any additional forms required in section 2.4.6.

2.4.3 Technical Proposal Contents. The Technical Proposal must address each of the evaluation criteria in section 3.2 and any other Technical Proposal requirements set forth in this RFP [[Searchable PDF](#) or [Microsoft Word format](#)].

Proposals should not include extensive artwork or other materials not essential to the utility and clarity of the Proposal. Do not include marketing or advertising material in the Proposal unless required by the RFP. **Do not include pricing information in the Technical Proposal.** All pricing information must be submitted as required in section 2.4.5.

2.4.4 Signed Proposal Coversheet. Proposer shall submit a completed Proposal Coversheet (RFP Attachment A) bearing the signature of Proposer's authorized representative (**PDF format**).

By submitting a Proposal in response to this RFP, Proposer (and if selected for award, also as the Contractor) agrees with Agency that signatures showing on PDF documents submitted or exchanged via email are “Electronic Signatures” under ORS Chapter 84 and bind the signing party and are intended to be and can be relied upon by the parties.

2.4.5 Pricing Information. The required pricing information must be submitted as two separate **Microsoft Excel files** The files should be clearly named to identify it as pricing information for the Proposer (example: XYZcorp_Pricing.xlsx). Pricing information must reflect pricing for Phases I and II and, in a separate Microsoft Excel file for Phase III, as follows:

Phase I and II:

Submit pricing information in the form of a detailed Price Proposal that includes all labor costs and direct non-labor expenses to complete the Services and deliverables identified for Phases I and II in this RFP within the required schedule. The Price Proposal must be prepared using the BOC-nbr form available at: <https://www.oregon.gov/odot/Business/Procurement/DocsPSK/bocnbr.xls>.

The Price Proposal for Phases I and II must include:

- Fully burdened billing rates (inclusive of labor cost, overhead, and profit) for Proposer staff and any subcontractor staff that will be performing the Services. The fully burdened billing rates submitted in the Price Proposal shall remain fixed and in effect (without escalation) for not less than the first 12 months of the Contract.
- For Proposer and any subcontractors, the proposed number of hours and staff assignments (classifications and names) with line-items for each element of the work (tasks and subtasks).
- For Proposer and for any subcontractors, an itemization of any necessary non-labor expenses such as travel, reproduction costs, equipment rental, etc., for each task/subtask. Such expenses must not be for costs included as overhead in Proposer’s or subcontractor’s fully burdened labor rates. Agency will not pay or reimburse any expenses incurred by Contractor during the completion of the Services except as authorized in the Statement Work or elsewhere in this Contract. Any such authorized travel expenses must comply with the Oregon Travel Policy available on the Internet at: <https://www.oregon.gov/das/Financial/Acctng/Documents/40.10.00.pdf>
- Contingency Tasks. These are tasks that may or may not be required based on circumstances that are determined after the work has begun. For any tasks identified as Contingency Tasks in the Statement of Work, separate line-item amounts must be shown on the Price Proposal for each Contingency task. The amount for a Contingency Task must include the total price for the task, including any expenses. Non-labor expenses for Contingency Tasks must not be included in an overall amount for direct non-labor expenses applied to the budget for the non-contingency tasks.

Phase III (separate Excel file):

Submit pricing information for Phase III in the form of per household unit pricing and total price for the hypothetical quantity of households listed below. The actual quantity of households participating in the survey completed in Phase III will be determined based on Phase I and II deliverables. At the conclusion of Phase II, the total price or not-to-exceed amount for Phase III will be negotiated based on Proposer’s per household unit pricing proposed under this RFP for the scenario below. For purposes of price evaluation and scoring under this RFP, the Price Proposal for Phase III must include:

- **Unit Price** - Single line-item showing the price per household participating in the survey. The unit price must be based on performing all Services described in Attachment B, Statement of Work, Tasks 3.1 and 3.2 for the following hypothetical scenario:
 - 20,000 households participating in travel diary surveys through year 2024, and
 - Post processing of 20,000 household surveys as described in Task 3.3.

- **Total Price** - Single line-item showing total price proposed for the above Phase III hypothetical scenario. This must be calculated as follows: **proposed unit price times 20,000**. This is for evaluation and scoring purposes only. The actual price total for Phase III will be determined based on the final quantity of households included in the survey and any adjustments to scope that many occur during negotiations.

2.4.6 Additional Required Forms/Documents. The following must be submitted electronically with the Proposal package, but separate from the Technical Proposal document (these items do not count toward the Proposal page limit):

- **Subcontractor Solicitation and Utilization Report - SSUR** available at: <https://www.oregon.gov/ODOT/Forms/2ODOT/2721.pdf>. Submit a completed, signed SSUR (PDF format). Also fax a copy of the completed, signed SSUR directly to ODOT Office of Civil Rights (Fax 503-986-6382) within 10 Business Days following RFP Closing.]
- **Conflict of Interest (COI) Disclosure Form** available at: https://www.oregon.gov/ODOT/Business/Procurement/DocsLPA/COI_LPA.docx. Submit a completed, signed COI Disclosure Form (PDF format).

(Note: Proposers should review [section 4](#) of this RFP to ensure they can comply with submittal requirements for the apparent successful Proposer.)

2.4.7 Proposal Package. Provide all required submittal items electronically to the SPC via the email specified on page 1 of the RFP. Include the RFP number and RFP Title on the email subject line.

Electronic File Size. Proposer shall make reasonable efforts to compress or optimize files to not exceed a combined **total of 15 megabytes for all submittals**. For tips on reducing file size, see information at the following links: [How to reduce PDF file size](#); [How to reduce the size of Word documents that contain images](#).

Electronic Signatures. By submitting a Proposal to this RFP, the Proposer (and if selected for award, also as the Consultant) agrees with the Agency that signatures showing on PDF documents submitted or exchanged via email are “Electronic Signatures” under ORS Chapter 84 and bind the signing party and are intended to be and can be relied upon by the parties.

2.4.8 Public records exemptions. When applicable, if Proposer believes any of its Proposal is exempt from disclosure under Oregon Public Records Law (ORS 192.311 through 192.478), Proposer shall also submit electronically with the Proposal package:

- an additional fully redacted electronic version of its Proposal, clearly identified as the redacted version.
- a memorandum citing the statutory justification for each specific area of the Proposal that Proposer claims to be exempt.

Identifying the Proposal in whole as trade secret, confidential or otherwise exempt from disclosure is not acceptable. Any content in the Proposal which Proposer believes to be a trade secret or exempt from public disclosure must be so indicated in conformance with the requirements of this section and [section 6.4](#) of this RFP.

3.0 EVALUATION PROCESS & CONSULTANT SELECTION

3.1 EVALUATION PROCESS

3.1.1 Proposal Opening. There will be no public opening of Proposals. Proposals received will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award is issued. However, Agency will record and make available upon request the identity of all Proposers after opening.

3.1.2 Responsiveness Review. Proposals submitted by the Closing date and time will receive an initial review by Agency for Responsiveness to all requirements (allowing for minor informalities) set forth in the RFP and RFP Coversheet. Any Proposal not meeting RFP requirements may be found non-Responsive and rejected.

3.1.3 Technical Proposal Evaluation. Technical Proposals found to be Responsive will be forwarded to an evaluation committee of at least 3 members that will independently review, score and rank Technical Proposals in accordance with the criteria and point allocation in section 3.2. Evaluators will independently judge the merits of each Technical Proposal by comparing the requirements and criteria stated in the RFP with the Responsiveness and the relevance of information, experience, and qualifications presented in the Technical Proposal.

If necessary, the SPC may request via email further clarification from Proposer to assist the evaluation committee in gaining additional understanding of Proposal. A response to a clarification request must be in Writing and may only clarify or explain portions of the already submitted Proposal and may not contain new information not included in the original Proposal. Clarifications may not be used to rehabilitate a non-Responsive Proposal.

Score for Technical Proposal = Total of the Technical Proposal scores (RFP section 3.2) from all evaluators for a given Proposer, divided by the number of evaluators.

3.1.4 Price Proposal Evaluation. The pricing information required in RFP Section 2.4.5 will be opened (and scored as set forth in RFP section 3.3) following completion of both the evaluation and scoring of Technical Proposals and Interviews as set forth in RFP section 3.1.5.

3.1.5 Interviews. Agency will conduct and score interviews with the top 3 ranked Proposers based on scoring of Technical Proposals. However, Agency, in its sole discretion, may select fewer or more than the top 3 ranked Proposers for interviews if there is a natural break in scores. As part of the interview process and scoring, Agency may elect to email follow-up questions for clarifications, if necessary, regarding information provided during the interview.

For interviews conducted, the following will apply:

- A minimum of 3 evaluators shall score the interviews;
- Evaluation and scoring will be based on the criteria in section 3.2;
- Interviews will have a maximum total score of 30 points;
- The number of Proposers selected for interviews/follow-up questions is at the sole discretion of Agency;
- Agency will conduct interviews via video conference.
- **Interview score** = Total of the interview scores from all evaluators for a given Proposer, divided by the number of evaluators.

Further details regarding interviews will be included with the notification of time and date of interviews, if conducted.

3.2 TECHNICAL PROPOSAL EVALUATION CRITERIA and POINTS AVAILABLE

	Evaluation Criteria	Maximum Points
1	<p>Understanding of Requested Services</p> <ul style="list-style-type: none"> ○ Demonstrate a clear and concise understanding of the scope of Services being requested in the Statement of Work (Attachment B). Response should address the following: Describe approach and schedule to meeting the deliverables and objectives of Phases I, II and III within associated timeline. (10) ○ List projects and contract services performed within the last 5 years by type and location, most comparable to the requested Services. (5) ○ Using 3 of the most recent projects or contracts (in any combination) listed, include a brief description of project type, size, location, duration and objectives; a chronological timeline describing the tasks performed by the Proposer to fulfill the project objectives; and the actual project budget. For each of the three projects or contracts, indicate whether the services were accomplished within Proposer’s original estimated budget and schedule, or needed to be revised. Briefly explain the reason for any revisions. (10) 	25
2	<p>Proposer’s General Experience, Qualifications, Capabilities and Capacity</p> <p>Demonstrate experience, qualifications, capabilities and capacity to complete the requested Services. Response must include:</p> <ul style="list-style-type: none"> ○ Describe Proposer’s management and organizational structure, and how that structure aids the delivery of project services - including chain of command and process for managing projects, including contact person (Project Manager) and their backup for project related issues. (5) ○ Describe qualifications and proficiencies enabling Proposer to complete the requested Services for all phases. (5) ○ An explanation describing how Proposer can accommodate varying levels of work as contracted including any limitations. Describe Proposer’s approach to adjusting schedules when needed, or adjusting level of effort in order to meet a schedule and keep a project within a stated budget. Provide detail related to the data collection phase and enduring sampling targets are met. (10) ○ An explanation of internal procedures and policies related to project management, quality assurance, quality control and cost control. (5) 	25
3	<p>Project Team Qualifications: Project Manager and Key Members</p> <p>Demonstrate Proposer’s team qualifications and experience relating to the requested Services.</p> <p>Response should address the following:</p> <ul style="list-style-type: none"> ○ List names, titles, responsibilities, and availability of key members who are anticipated to perform Services. (5) ○ List of sub-contractors, their addresses, and Services proposed to be generally committed to each. (5) ○ Qualifications (including any specified licenses, certifications, and advanced degrees) and relevant individual experience for all key team members likely to perform Services, including sub-contractors. (5) ○ Short description of Proposer’s experience using teams on similar or related projects. (5) 	30

	<ul style="list-style-type: none"> ○ Project Managers' experience with managing project teams. (5) ○ Approach to project continuity should Project Manager and/or Key Members change during this project timeline. (5) 	
4	<p>Project Team Experience</p> <p>The Proposer and Team must demonstrate expertise and knowledge in the following areas (in no particular order). Cite specific projects exhibiting experience in the following areas:</p> <ul style="list-style-type: none"> ○ Household activity surveys, especially those with purpose of data collection for travel demand modeling, including specialized surveys such as recreational or seasonal travel, and panel surveys. (20) ○ GPS data collection associated with travel surveys, including data processing techniques that make useable data available in a timely manner and reducing respondent burden. (20) ○ Developing sampling strategies for a large geographic area, such as a state or large county that requires geographic stratification and meeting sampling targets relating to travel modes, rural-urban, age, income, and race. (20) ○ Techniques used to address non-response, meeting sampling targets, avoiding oversampling and developing expansion weights. (20) ○ Methods to expedite the data cleaning process in order to provide analysis-ready data, summary reports and processed data sets ready for use in model estimation for activity based travel models. (10) ○ Meeting coordination and facilitation experience - working with multiple stakeholder committees such as a state agency, MPO or county to identify project needs and determine appropriate methodology, meeting arrangements and minutes, monitoring and follow-up with committee member assignments. (10) 	100
5	<p>Reference Questionnaires - Scoring for Relevant Experience</p> <p>Provide references for the 2 most recent, relevant projects that were completed through final deliverables in the last 5 years. To be relevant, projects listed should include services that are similar in nature and complexity to the Project(s) described in this RFP. Proposers may not selectively pick projects/references. Rather, they must submit references for the most recent projects that are relevant to the services requested in this RFP. Failure to submit the most recent, relevant references will be considered non-responsive and may result in Proposal rejection.</p> <p>Proposer must complete sections A and B of a separate Reference Questionnaire form (RFP Attachment D) for each reference and send to the reference contact electronically (MS Word Format). <u>Completed Reference Questionnaire forms must then be sent by the reference directly to SPC at the e-mail address on the form no later than the close date and time of this RFP.</u></p> <p>To ensure a minimum of 2 Reference Questionnaires are received by Agency, Proposers may, at their discretion, submit a maximum of 3 additional references as alternates. If alternate references are submitted they must use the required forms, continue to follow the required "most recent" protocol and the Reference Questionnaire forms must be submitted directly to SPC by the reference. Reference scoring will be based on the required references plus any alternates necessary to make up the required minimum number of submittals.</p> <p>It is the Proposer's responsibility to contact each reference to -</p>	30

<ul style="list-style-type: none"> • Ensure the client contact information is correct and confirm (or obtain) contact information for an appropriate alternate contact; • Request that the reference or alternate complete part C of the Reference Questionnaire and return it directly to SPC, per the instructions on the questionnaire, by the close date and time of this RFP. • Ensure that references use the attached form and do not use previously completed reference questionnaire forms from prior solicitations, as they may include different questions and scoring. <p>If the contact and alternate contact for the reference are both members of the evaluation committee for this RFP, Agency will request a different project reference from the Proposer.</p> <p>Up to 30 points are available from scores provided by Agency’s evaluators based on the relevance of the project(s) and services submitted by the reference(s).</p>	
Total	210

3.3 PRICING INFORMATION EVALUATION and POINTS AVAILABLE

Price Scoring	Maximum Points
<p>Following scoring and ranking of Technical Proposals and Interviews, Price Proposals (based on a hypothetical scenario of 20,000 households and in conformance with the requirements in RFP section 2.4.5) will be opened and scored as follows:</p> <ul style="list-style-type: none"> • Proposer with the lowest price (combined Phases I, II and III) will receive 75 points. • Proposer with the second lowest price (combined Phases I, II and III) will receive 50 points. • Proposer with the third lowest price (combined Phases I, II and III) will receive 25 points. • All other Proposers will receive 0 points. 	75

3.4 TOTAL SCORE and AWARD

SUMMARY OF CRITERIA and MAXIMUM SCORES

DESCRIPTION	MAXIMUM SCORE
Technical Proposal and References:	
Understanding of Requested Services	25
Proposer’s General Experience, Qualifications, Capabilities and Capacity	25
Project Team Qualifications: Project Manager and Key Members	30
Project Team Experience	100
References	30
Subtotal: Technical Proposal, References and Interviews	210
Interviews/Follow-up Questions, if conducted (see section 3.1.5)	30
Subtotal: Technical Proposal, References and Interviews	240

Pricing Information	75
Maximum Total Score: Technical Proposal, References, Interviews and Pricing	315

3.4.1 Total Score for Proposer Ranking - The total scores for final Proposer ranking will be calculated as follows:

Average of all evaluators' Technical Proposal scores plus score for Pricing Information plus Average of all evaluators' interview scores.

3.4.2 Method of Award. Unless all Proposals are rejected or the RFP is cancelled, tentative award will go to the Proposer determined to be the most Advantageous Responsive and Responsible Proposer. Generally this includes, but is not limited to, the Responsive and Responsible Proposer with the highest total score for Technical Proposal and pricing as calculated under 3.4.1 above.

3.5 REFERENCES

Agency reserves the right to investigate references including customers other than those provided in the Proposal or Proposal Coversheet (Attachment A). Investigation may include past performance of any Proposer with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, its completion or delivery of a project on schedule, and its lawful payment to employees and workers or any other criteria as determined by Agency.

3.6 RESPONSIBILITY DETERMINATION

Agency will determine if an apparent successful Proposer is Responsible, pursuant to ORS 279B.110, prior to award and execution of the Contract. At any time prior to Contract execution, Agency may reject any Proposer found to be not Responsible.

3.7 INTENT TO AWARD NOTICE

If an apparent successful Proposer is selected, Agency will issue an intent to award notice and will provide via email a copy of the notice (or electronically post) to all Proposers. Award to the apparent successful Proposer is subject to successful negotiation of the Contract.

4.0 APPARENT SUCCESSFUL PROPOSER SUBMISSION REQUIREMENTS

The submittal requirements in this section 4 apply only to a Proposer that receives intent to award notice following Agency's evaluation and scoring of Proposals (and interviews, if conducted).

Failure to submit required submittal items in a timely manner may result in Agency rescinding the intent to award notice and issuing notice of intent to award to the next ranked Proposer.

4.1. CERTIFICATION REGARDING DEBARMENT & OTHER RESPONSIBILITY MATTERS

Within 5 Business Days of receipt of notice of intent to award, for contracts that will exceed \$150,000 (including as may be amended) the apparent successful Proposer shall submit a signed Certification Regarding Debarment, Suspension, Proposed Debarment, and Other Responsibility Matters form available on line at: <https://www.oregon.gov/ODOT/Business/Procurement/DocsPSK/CertFederal.pdf> (ref 48CFR 52.209-5)

4.2. CERTIFICATES OF INSURANCE

Prior to Contract execution, the apparent successful Proposer shall provide certificates of insurance via e-mail) for insurance coverage required in Exhibit C of the Sample Contract (RFP Attachment C).

4.3. TAX ID NUMBER

The apparent successful Proposer shall provide their Taxpayer Identification Number (TIN) and backup withholding status on a completed [W-9 form](#) if either of the following apply:

- When requested by Agency prior to Contract execution, or
- When the backup withholding status or any other information of Proposer has changed since the last submitted W-9 form, if any.

4.4. BUSINESS REGISTRY NUMBER/REGISTERED AGENT

If selected for award, the apparent successful Proposer must be duly authorized by the State to transact business in the State before executing the Contract. The Proposer shall submit a current Oregon Secretary of State business registry number (unless operating as your real and true name). See [process for obtaining a business registry number](#). All Corporations and other business entities (domestic and foreign) must have a Registered Agent in Oregon. See requirements and exceptions regarding [Registered Agents](#). For more information, see [Oregon Business Guide, How to Start a Business in Oregon](#) and [Laws and Rules](#). The titles in this subsection are available at the following Internet site: https://www.filinginoregon.com/pages/business_registry/laws_rules.html.

4.5. RESPONSIBILITY INQUIRY FORM

The apparent successful Proposer shall submit a completed, accurate and signed Responsibility Inquiry form **within 5 Business Days** of receipt of Intent to Award notice (see form for additional information regarding Agency's responsibility review). The Responsibility Inquiry form is available at: <https://www.oregon.gov/ODOT/Business/Procurement/Pages/PSK.aspx> (under Miscellaneous Procurement Forms) and must be submitted via e-mail.

Consultant is responsible for any and all contractual matters, including performance of Services and the required deliverables included in the Contract, whether Consultant, a representative of Consultant, or subconsultant/subcontractor of Consultant produces them.

4.6. PAY EQUITY CERTIFICATION

If the Contract value exceeds \$500,000 (including as may be amended) **AND** Proposer employs 50 or more full-time workers, Proposer shall submit to Agency a copy of a true and correct unexpired Pay Equity Compliance Certificate prior to Contract execution. The certificate must be issued to a current authorized representative employed by the Proposing firm. See the following for instructions on how to obtain the certificate from Oregon Department of Administrative Services: www.oregon.gov/das/Procurement/Documents/SB491PayEquity.pdf.

If the Contract value will not exceed \$500,000 **OR** Proposer has 49 or fewer employees, then Proposer is **NOT** required to take the training and submit the certificate. However, they are required to comply with ORS. 652.220, and are encouraged to take the training.

- RESERVED

5.0 NEGOTIATIONS

Following notice of intent to award, Agency will negotiate in the best interest of Agency, including the SOW, appropriate staff classifications and hours for each task, pricing information, and any other provision(s) Agency has indicated in the RFP or any Addenda it will negotiate. This does not include negotiation of the standard terms and conditions of the Sample Contract, which are intended to be consistent from project to project. Agency, at its discretion, may conduct more than one round of discussions or negotiations. Any revisions to the SOW, delivery schedule, costs or any other changes resulting from negotiations must be reduced to Writing and reflected in the final Contract.

If Agency and apparent successful Proposer are unable for any reason to reach agreement within a reasonable amount of time, Agency may thereafter negotiate serially with the second ranked Proposer, and if necessary, with the third ranked Proposer, and so on until negotiations result in Contract award or the solicitation is terminated. Agency, in its sole discretion, may proceed with a new solicitation for the same Services or consider any other options available under the applicable rules, laws, and policies.

6.0 GENERAL TERMS & CONDITIONS FOR THIS RFP

6.1 NON-DISCRIMINATION

Agency, in accordance with the Title VI of the Civil Rights Act of 1964, 78 Stat. 252. 42 U.S.C. 2000d to 2000d-4 and Title 49, Code of Federal Regulations, Department of Transportation, Subtitle A, Office of the Secretary, Part 21, Nondiscrimination in Federally-Assisted programs of the Department of Transportation issued pursuant to such Act, hereby notifies all Proposers that it will affirmatively ensure that all business enterprises will be afforded full opportunity to submit Proposals in response to this solicitation and will not be discriminated against on the grounds of race, color, sex, or national origin in consideration for an award.

6.2 FUTURE WORK LIMITATIONS

(For these purposes, "Affiliate" or "Affiliates" of a consultant means any Person or entity that controls, is controlled by or is under common ownership or control with that consultant.)

- If a consultant or any Associate of consultant enters into personal services contract(s) with Agency for the purpose of advising or assisting in developing specifications, a scope or statement of work, an invitation to bid, a request for proposals or other solicitation documents and materials related to a given procurement, the consultant may not be eligible to propose/bid on the prospective procurement (based on a case-by-case assessment by Agency, ODOT or FHWA). See [Oregon Laws 2012, Chapter 53](#).

6.3 ELECTRONIC FILES LINKED OR ATTACHED TO RFP

This RFP document must be viewed electronically to access files, attachments, forms, provisions or other documents that are attached electronically (shown as icons) or provided via hyperlinks from the Internet in this RFP. All files, attachments forms, provisions or other documents attached electronically or linked from the Internet are incorporated in this RFP with the same force and effect as though fully set forth in this RFP.

6.4 PUBLIC RECORDS

All Proposals are public record and are subject to public inspection after Agency issues the Notice of the Intent to Award. Application of the Oregon Public Records Law will determine whether any information is actually exempt from disclosure. All Proposals submitted in response to this RFP become the Property of Agency. By submitting a Proposal in response to this RFP, Proposer grants the State a non-exclusive, perpetual, irrevocable, royalty-free license for the rights to copy, distribute, display, prepare derivative works of and transmit the Proposal solely for the purpose of evaluating the Proposal, negotiating a Contract, if awarded to Proposer, or as otherwise needed to administer the RFP process, and to fulfill obligations under Oregon Public Records Law (ORS 192.311 through 192.478). Proposals, including supporting materials, will not be returned to Proposer unless the Proposal is submitted late.

6.5 USE of RECYCLED PRODUCTS

Consultants/contractors shall use recyclable products to the maximum extent economically feasible in the performance of the Contract work set forth in this document.

6.6 RFP CANCELLATION

Agency may cancel this RFP or reject any or all Proposals in accordance with ORS 279B.100, if doing either would be in the public interest as determined by Agency. In no event shall Agency have any liability for the cancellation of this RFP.

6.7 COST OF SUBMITTING A PROPOSAL

Proposer shall pay all the costs in submitting its Proposal, including, but not limited to, the costs to prepare and submit the Proposal, costs of samples and other supporting materials, costs to participate in demonstrations, or costs associated with protests.

6.8 PUBLICITY

Any publicity giving reference to this Project, whether in the form of press releases, brochures, photographic coverage, or verbal announcement, shall be done only after prior written approval of the Agency.

ATTACHMENT A - PROPOSAL COVER SHEET

Part I - Proposer Information and References

RFP#: 2021-0001

Legal Name of Firm as provided to IRS:

DBA Name (if different than legal name):

DUNS Number: _____	Is Proposer registered as a foreign corporation in Oregon? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Corporation <input type="checkbox"/> Professional Corporation <input type="checkbox"/> Ltd. Liability Company <input type="checkbox"/> Partnership <input type="checkbox"/> Limited Partnership <input type="checkbox"/> Ltd. Liability Partnership <input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Other:	
State of Incorporation/Organization: _____	
Mailing Address: _____	
Type name of authorized contact for this RFP: _____	
Email address: _____	
Telephone: _____ Fax: _____	
Type name of person(s) authorized to sign Contract: _____	

MINIMUM QUALIFICATIONS

Per RFP section 2.3.2 - Proposer has listed references below for 2 projects completed in the last 5 years that are similar in nature to the Services described in this RFP.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Per RFP section 2.3.3 - Proposer has demonstrated in the following areas: 2.3.3.1 Designing household activity surveys, especially those with the purpose of data collection for travel demand modeling, including specialized surveys such as recreational or seasonal travel, colleges/universities, hard-to-reach populations, other special markets and panel surveys. 2.3.3.2 Location data collection strategies associated with travel surveys, including data processing techniques that make useable data available in a timely manner. 2.3.3.3 Developing sampling strategies for a large geographic area, such as a state or large county that requires geographic stratification. 2.3.3.4 Leveraging information from the National Household Travel Survey and other data sources to help reduce state and regional-level data collection efforts. 2.3.3.5 Identifying successful survey participant recruitment strategies, including strategies to reduce the respondent burden. 2.3.3.6 Inter-agency coordination and facilitation, including working with a large stakeholder committee to determine appropriate methodologies and address varying survey needs by agency and/or geography. 2.3.3.7 Experience evaluating the suitability of emerging synthetic data opportunities for supplementing or supplanting data collection efforts is desired. 2.3.3.8 Experience preparing reports or visuals to communicate survey results. 2.3.3.9 Survey Implementation shall demonstrate experience in all areas above, and have these additional qualifications: 2.3.3.10 Demonstrated experience and staff capacity to successfully implement and manage concurrent data collection programs for multiple agencies and geographies. 2.3.3.11 Experience with methods to expedite the data cleaning process and weighting in order to provide analysis-ready data. 2.3.3.12 Experience coordinating surveys over a multi-year timeframe to accommodate stakeholder agency funding availability.	<input type="checkbox"/> Yes <input type="checkbox"/> No

REFERENCES

Provide references for 2 clients for which Proposer has provided, in the last 5 years, similar services to those described in this RFP (please verify contact information):

1) Name of Client: _____ **Reference Contact Person:** _____
Telephone: _____ Email: _____
Project Title: _____
Period of Performance: _____ Completed on Schedule: Yes , No
Contract Estimated Cost: _____ Contract Actual Cost: _____
Name of Proposer's Project Manager: _____

2) Name of Client: _____ **Reference Contact Person:** _____
Telephone: _____ Email: _____
Project Title: _____
Period of Performance: _____ Completed on Schedule: Yes , No
Contract Estimated Cost: _____ Contract Actual Cost: _____
Name of Proposer's Project Manager: _____

ATTACHMENT A - PROPOSAL COVER SHEET

Part II - Proposer Certifications

By signing below, the authorized representative on behalf of Proposer certifies that:

1. Proposer agrees to and shall comply with the terms and conditions of the sample contract associated with this RFP and all requirements, specifications and terms and conditions contained within the RFP. Proposer acknowledges receipt of any and all Addenda to this RFP.
2. All contents of the Proposal (including any other forms or documentation, if required under this RFP) and this Proposal Cover Sheet, are truthful and accurate and have been prepared independently from all other Proposers, and without collusion, fraud, or other dishonesty. No attempt has been made or will be made by Proposer to induce any other person to submit or not submit a Proposal. Proposer understands that any statement or representation it makes, in response to this solicitation, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" {as defined by the **Oregon False Claims Act**, ORS 180.750(1)}, made under the resulting Contract being a "false claim" {ORS 180.750(2)} subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.
3. Proposal is a firm offer for 180 days following the Closing.
4. Proposer has available the appropriate material, equipment, facility and personnel resources and expertise, or ability to obtain the resources and expertise, necessary to demonstrate the capability of the firm to meet all contractual responsibilities.
5. Proposer has not been notified within the last 3-year period of any delinquent Federal, State or local taxes in an amount that exceeds \$3,000 for which the liability remains unsatisfied.
6. Proposer, its principals and major subcontractors (major subcontractor is defined as receiving 10% or more of the total Contract amount) have not presently, or within the last 3 years, been convicted of, indicted for, or otherwise criminally or civilly charged by a governmental entity with the commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of federal or state antitrust statutes relating to the submission of bids or Proposals; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property.
7. Proposer has not and will not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin. And, pursuant to ORS 279A.110, Proposer has not and Proposer will not discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business certified under ORS 200.055.
8. Proposer's employees and agents are not included on the list entitled "Specially Designated Nationals and Blocked Persons" maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at <https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx>
9. Proposer and its Principals, and any of its prospective subcontractors for this award are not presently debarred, suspended, disqualified, proposed for debarment or declared ineligible for the award of contracts by any federal agency or agency of the State of Oregon, and does not have an Active Exclusion on the System for Award Management (SAM) which is available at <https://sam.gov/>.
10. Proposer, acting through its authorized representative, has read and understands the RFP instructions, specifications, and terms and conditions contained within the RFP (including the sample contract) and all Addenda, if any. The Proposal submitted is in response to the specific language contained in the RFP, and Proposer has made no assumptions based upon either (a) verbal or written statements not contained in the RFP, or (b) a previously-issued RFP, if any.

Signature: _____ Date: _____
(President or Authorized Representative of Proposer)

Print Name: _____ Title: _____

ATTACHMENT B - STATEMENT of WORK

A. PROJECT DESCRIPTION and OVERVIEW of SERVICES

Lane Council of Governments (herein after referred to as “Agency”) is inviting Proposals for the Oregon Household Activity Survey, a collaborative and coordinated multi-agency effort. Transportation analysts, planners and decision-makers rely on periodic travel surveys to provide a “snapshot” of current household travel behavior. The data collected through household travel survey efforts are also critical for updating and improving travel demand models, the foundational analytical tool used to support transportation planning, as they provide a comprehensive picture of personal travel behavior that is lacking in other data sources.

Because household demographics and travel behavior can change significantly over time, the various agencies responsible for transportation planning throughout Oregon have traditionally conducted travel survey efforts approximately every 10 years. The most recent household travel survey effort in Oregon was conducted from 2009 to 2011. The Oregon Department of Transportation (“ODOT”), the 8 Metropolitan Planning Organizations (“MPO”) across Oregon, and the Southwest Washington Regional Transportation Council (“RTC”) have begun to plan for the next household travel survey effort. The survey data will be critical for policy- and decision-makers across the State. It will also be used to further the development of a variety of MPO and statewide trip-based and activity-based travel models throughout Oregon, including models in the Portland/Vancouver, WA area and other Oregon metropolitan and non-metropolitan areas, and to further the development of integrated land use-economic-transportation models being developed by ODOT.

The Oregon Modeling Steering Committee (“OMSC”) is a collaborative forum that promotes coordination and knowledge/information sharing across the many agencies that are responsible for travel modeling within Oregon and Southwest Washington. The OMSC’s mission is to ensure that transportation agency partners around the state continue to have the right analytical tools, and the skills and expertise needed to help answer important planning and policy questions about Oregon’s transportation system, growth and development, and its economy. A subcommittee of the OMSC, the Travel Survey Subcommittee (“TSS”), has been established to develop strategies for collecting the travel behavior data needed for travel modeling at city, regional and statewide levels. TSS will serve as the central forum for inter-agency coordination during survey planning and implementation.

In 2018, TSS met several times to learn about recent advances in travel survey approaches and methodologies. During this background information gathering phase, TSS also heard from several peer MPOs, state departments of transportation, and national consultants as to how coordinated statewide survey efforts are currently being implemented. Given the resource-intensive nature of large-scale statewide household travel survey efforts and the rapidly evolving transportation landscape, TSS is especially interested in developing a financially sustainable approach for the Oregon modeling community that provides opportunities for more frequent surveys rather than a single large survey program at 10-year intervals. TSS is also interested in leveraging modern data collection methods and new technologies to enhance the efficiency of both survey design and implementation.

The purpose of this Request for Proposals (“RFP”) is to solicit consultant Proposals for:

- Phase I - Scoping. This Phase includes evaluating and documenting best practices, methodologies and strategies for implementing a statewide household survey.
- Phase II - Survey Design. This Phase includes developing the design, methodology and cost for implementing a statewide household survey.
- Phase III - Implementation. This Phase includes implementation of the Statewide survey in accordance with the Phase II Survey Design as approved by the Agency.

Phases I and II will be conducted over a 10-month timeframe during 2021-2022. Phase III will be conducted over a 24-month timeframe during 2022-2024.

General Expectation. Consultant commits to provide, oversee and direct Services herein to obtain the greatest long-term value for the government, and to promote prudent expenditure of public funds within the constraints of the project, program, context, budget and cost-effective sustainability principles. Consultant shall: (i) avoid expenditures for aesthetic effect which are disproportionate to the project as a whole; (ii) use recycled/recyclable products to the maximum extent economically feasible in the performance of this Contract, and (iii) apprise Agency throughout the project concerning any issues or decisions with potential economic impact to the project.

Project Phasing

This Project is divided into three phases:

- Phase I - Scoping. This Phase includes evaluating and documenting best practices, methodologies and strategies for implementing a statewide household survey.
- Phase II - Survey Design. This Phase includes developing the design, methodology and cost for implementing a statewide household survey.
- Phase III. Implementation. This phase includes implementing the OHAS in accordance with the Phase II Survey Design as approved by the Agency.

This Statement of Work addresses Phases I and II of the Project. Phase III is optional, at Agency's discretion, and may be added via amendment(s) to the Contract. Alternatively, Agency may issue one or more additional solicitations to award Phase III components, as outlined below.

Funding for the project will be provided by multiple agency partners. Notices to proceed for various project components and Phases will be authorized as funding availability allows. While this RFP is limited to Phases I and II, Consultant should be aware that any contract awarded for Phases I and II may be amended and extended to encompass performance of Phase III work. Agency recognizes that smaller firms with expertise in travel survey scoping and design may lack the capacity to contract for survey implementation. Accordingly, Agency reserves the right to issue a separate, future RFP for Phase III.

Consultant shall lead TSS through an initial scoping effort to identify key data needs and issues, select appropriate survey strategies, and prepare a plan for survey implementation that is sensitive to the available budget and budgeting timelines of multiple Agency partners as identified above (Phase I and Phase II). Notice to Proceed (NTP) shall be used to authorize Phase III work described above. Said NTPs and amendments thereto shall be agreed to by both parties, with scope of work, delivery schedule, and total compensation to be negotiated at the time the NTP is proposed by either party. NTP that do not meet these requirements shall not be binding and no further compensation will be allowed for any NTP work performed.

Agency Responsibilities

Agency will be responsible for contract administration and coordination with the Project Manager (TSS Chair) and TSS.

Acronyms and Definitions

APM - Agency Project Manager

BMPO - Bend Metropolitan Planning Organization

CWCOG - Cascades West Council of Governments

LCOG - Lane Council of Governments

MPO - Metropolitan Planning Organization

MRMPO - Middle Rogue Valley Metropolitan Planning Organization

MWVCOG - Mid-Willamette Valley Council of Governments

NTP - Notice to Proceed

ODOT - Oregon Department of Transportation

OMPOC - Oregon Metropolitan Planning Organization Consortium

OSMC - Oregon Modeling Steering Committee

OSU - Oregon State University
RFP - Request for Proposals
RTC - Southwest Washington Regional Transportation Council
RVCOG - Rogue Valley Council of Governments
SKATS - Salem-Keizer Area Transportation Study
TNC - Transportation Network Company
TSS - Travel Survey Subcommittee

B. STANDARDS and GENERAL REQUIREMENTS

1. Standards

RESERVE

2. Software and Format Requirements

Software standards and formats include but are not limited to the following:

- Each draft and final text-based or spreadsheet-based deliverable shall be provided in MS Office file formats (i.e., MS Word, Excel, etc.) and must be fully compatible with version used by Agency.
- Consultant shall submit draft and final deliverables in electronic format via e-mail (and hard copy if requested).
- Consultant shall also submit any graphic files accompanying reports separately in .jpg or .tif formats unless specified differently by Agency.

Consultant's software shall produce deliverables that are fully compatible, readable and useable by Agency software, requiring no modification or translation of Consultant's deliverables. No loss of data integrity or accuracy shall result from any transfer of data. Compressed data shall be in a "self-expanding executable" format. Additional format requirements may be listed elsewhere in the Statement of Work or in the Contract.

3. Professional Licenses, Registrations and Qualifications

- Agency may require Consultant's Personnel to demonstrate a competency in the particular area/discipline to which they are assigned. This may include, but is not limited to, submittal of license number, resume, and work samples from previously completed projects.

4. General Requirements

- **Safety Equipment.** Consultant shall provide and use all safety equipment including (but not limited to) hard hats, safety vests and clothing if required by State and Federal regulations and Agency policies and procedures for the Services under the Contract.

5. RESERVED

6. Design Criteria and Project Assumptions/Conditions

Consultant shall consider the following specific areas of interest identified by OHAS partner agencies and provide recommendations on their impact on survey implementation budget and scope.

Large MPOs (Portland Metro/RTC): A sufficient sample of households exhibiting use of all modes of travel, including bus transit, light rail, streetcar, transportation network company (i.e. ride hailing services), park-ride, personal electric transport (e.g. e-bike, e-scooter), walk and bicycle is necessary. Consultant shall give careful thought and attention to survey sample design and recruitment. In addition, Consultant shall design sampling to meet Agency's demonstrated emphasis on income and race equity considerations and to reflect the built environment (i.e., suburban, urban, very urban).

Mid-Size MPOs (CLMPO and SKATS): Both CLMPO and SKATS samples must include a sufficient cross-section of households displaying use of all modes of travel, including bicycle, walking, transit, and

transportation network companies. Consultant shall collect statistically and geographically valid survey samples to represent all the cities within these MPOs. Consultant shall collect survey samples that are socioeconomically and racially representative of the local demographic patterns.

In Eugene, the University of Oregon has a dominant impact on travel patterns. Lane Community College is also located in Eugene, with its main campus in southeast Eugene and a smaller branch in downtown Eugene. Consultant shall consider this and other factors, including group housing.

The Salem area includes a large community college serving mainly commuters and two smaller private colleges (with mostly dormitories), Chemeketa Community College in northeast Salem and Corban College in southeast Salem. Chemeketa significantly impacts transit to and from East Salem. In addition, there is a large government presence (state, county and city) distributed throughout the urban area, which draws commuters from outside Salem. With the proximity to the Portland Metropolitan area, there are a considerable number of commuters heading north for jobs, services and entertainment. Currently transit use in the Salem area is low, but new service expansion has the possibility of drawing more riders. Consultant shall consider these factors in the survey scoping and design Services.

Small MPO Areas (BMPO, CAMPO, AAMPO, Rogue Valley and Middle Rogue Valley MPOs): Bend experiences significant recreational travel, especially in summer, and BMPO may be interested in a separate survey or auxiliary survey questions to focus on the use of “second home” developments (Black Butte, Sun River, Crooked River Ranch) and the travel behavior of visitors.

The presence of Oregon State University (OSU) in Corvallis influences travel patterns, which has prompted ODOT to develop an OSU-specific travel model overlay for the region. AAMPO and CAMPO are also particularly interested in understanding intercity travel specifically between their two metropolitan centers, which are in close proximity.

The City of Ashland in the RVMPO area is the location of Southern Oregon University. The RVMPO also has questions about travel related to tourist activity in the Ashland area during the Shakespeare season.

Non-MPO Areas: Consultant shall conduct sampling in non-MPO areas around the state to support models in cities outside the MPO areas, to support the Oregon statewide model, and to inform external stations of MPO models.

All Areas:

- Given the discussion of how questions related to citizenship could influence the 2020 Census, both RVMPO and MRVMPO are anticipating that Census data for their largest ethnic demographic may be under-reported for the next decade. Consultant shall explore how travel survey recruitment methods can help address this potential shortcoming and other potential equity data shortcomings.
- Consultant shall provide Agency partners with survey data in GIS format with x-y coordinates for home and work locations with names and addresses removed to retain the anonymity and protecting the privacy of survey participants.

C. REVIEW, COMMENT and SCHEDULE OVERVIEW

- Consultant shall coordinate with Agency staff as necessary and shall revise draft deliverables to incorporate draft review comments.
- Consultant shall incorporate comments within 10 business days from receipt by Agency and return the revised deliverables to Agency staff, unless a different timeframe is specified for specific tasks or otherwise agreed to in writing by Agency.

D. PROJECT COOPERATION

Consultant shall only be responsible for those obligations and deliverables identified as being assigned to Consultant (or its subconsultants) in this Contract and the Statement of Work. All work assigned to

other entities, other than subconsultants, is not subject to this Contract, but shall be the subject of separate Intergovernmental Agreements or contracts which will contain the obligations of those entities. Any tasks or deliverables assigned to a subconsultant shall be construed as being the responsibility of Consultant. Any Consultant tasks or deliverables which are contingent upon receiving information, resources, assistance, or cooperation in any way from another entity (other than subconsultants) as described in this Statement of Work shall be subject to the following guidelines:

- a. At the first indication of non-cooperation, Consultant shall provide written notice to Agency's Project Manager (APM) of the specific acts or inaction indicating non-cooperation and of any deliverables that may be delayed due to such lack of cooperation by other entities referenced in the Statement of Work.
- b. APM shall contact the non-cooperative entity/s to discuss the matter and attempt to correct the problem and expedite items determined to be delaying Consultant/project.

If Consultant has followed the notification process described in section "a", and delinquency or delay of any deliverable is found to be a result of the failure of other referenced entities to provide information, resources, assistance, or cooperation, as described in the Statement of Work, Consultant will not be found in breach or default with respect to delinquencies beyond any reasonable control of Consultant; nor shall Consultant be assessed or liable for any damages arising as a result of such delinquencies. Neither shall Agency be responsible or liable for any damages to Consultant as the result of such non-cooperation by other entities. Agency's Contract Administrator will negotiate with Consultant in the best interest of the government, and may revise the delivery schedule to allow for delinquencies beyond any reasonable control of Consultant. Revised delivery dates beyond the expiration date require an amendment to the Contract.

E. TASKS, DELIVERABLES and SCHEDULE

PHASE I

1. Scoping

1.1 Project Management and Coordination

Agency will administer the Contract on behalf of the Agency partners and will negotiate intergovernmental agreements directly with Agency participants. Consultant shall provide overall project coordination and day-to-day management of project activities. Consultant shall coordinate with Agency partners and facilitate collaborative decision-making on multi-agency issues within the established framework of TSS.

Consultant shall schedule, conduct and attend monthly progress meetings with APM, and/or others as identified by APM.

Deliverables:

- Consultant shall prepare a Project Schedule meeting established deliverables within expected timeframe.
- Monthly progress reports submitted with Consultant's invoice, including:
 - Project status by task breakdown and percent complete,
 - Changes and reasons for any changes in schedule, work products, scope or team personnel
 - Unanticipated problems or issues that may delay the delivery schedule; and
 - Other relevant events or information.
- Monthly progress meetings, including:
 - An agenda not less than 5 business days prior to each meeting, and
 - Meeting notes summarizing issues discussed, decisions made and future action items agreed to, provided within 5 business days following the meeting.

1.2 Survey Work Planning

Consultant shall facilitate a remote work session #1 (i.e., kickoff meeting) with Agency and TSS to discuss survey needs and issues, and to obtain feedback on preliminary survey strategies and methods.

Following the kickoff meeting, Consultant shall perform a “State of the Practice” assessment and Consultant shall prepare a State of the Practice technical memorandum summarizing the assessment and including, but not limited to, the following:

- Summary of survey needs, issues and feedback obtained during the initial work session
- Methods and approaches used elsewhere that may have relevant applications in Oregon, based on needs identified by TSS
- Evaluation of methodologies, strategies, and recommendations on survey issues around equity, integration of National Household Travel Survey and/or other third-party (“big data”) products, interagency coordination, data collection methodologies, incentives, potential links to other existing data sets (for example health data, DMV records, traffic safety data, or other existing data) and other survey needs identified by TSS.
- Evaluation and recommendations for survey implementation designed to address budget uncertainty and impacts on associated sample size.

Consultant shall facilitate remote Work Session #2 with Agency and TSS and present content and recommendations from Technical Memorandum #1.

Consultant shall also prepare Technical Memorandum #2: Preliminary Work Plan that addresses issues and needs identified by Agency, outlines recommended chronological steps to be taken to accomplish the survey, describes the quality assurance processes to be used, and identifies roles and responsibilities for each participating partner agency and key members of Consultant’s team.

Consultant Deliverables:

- Project Schedule for Phases I and II
- Work Session #1 with Agency and TSS, including:
 - Preparing agenda, not less than 5 business days prior to the meeting
 - Preparing PowerPoint slides and materials as needed, not less than 5 business days prior to the meeting;
 - Preparing meeting notes, provided within 5 days following the meeting
- Technical Memorandum #1: State of the Practice, within 3 weeks following the kickoff meeting.
- Work Session #2 with Agency and TSS, including:
 - Preparing agenda
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Preparing meeting notes, provided within 5 days following the meeting
- Technical Memorandum #2: Preliminary Work Plan, within 4 weeks following Work Session #2.

PHASE II

2. Design

2.1 Project Management and Coordination

During Phase II, Consultant shall schedule, conduct and attend monthly progress meetings remotely with APM, and/or others as identified by APM. Phase II will also include up to 8 work sessions with individual participating agencies (with phone attendance by Agency’s contract administrator) and 9 work sessions with TSS. Consultant shall schedule, conduct and attend all meetings.

Deliverables:

- Monthly progress reports submitted with Consultant’s invoice, including:
 - Project status by task breakdown and percent complete;
 - Changes and reasons for any changes in schedule, work products, scope or team personnel; and
 - Unanticipated problems or issues that may delay the delivery schedule; and other relevant events or information.
- Monthly progress meetings, including:
 - An agenda not less than 5 business days prior to each meeting, and
 - Meeting notes summarizing issues discussed, decisions made and future action items agreed to, provided within 5 business days following the meeting.
- Work Sessions #3, #4, and #5, with Agency and TSS, including:
 - Preparing agenda
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Preparing meeting notes, provided within 5 days following the meeting

2.2 Develop Sampling Approach and Recruitment Strategies

Consultant shall develop and recommend sampling options including but not limited to address-based, list-assisted, random digit dialing, and others.

Consultant shall understand each OHAS partner agency’s specific interests for the survey, identify possible strategies that fit within the project scope and budget, and recommend recruiting methodologies, which may be varied by geographic area depending on need and budget. Consultant may conduct one-on-one discussions with participating agencies, and the most appropriate sampling approaches must be tested, evaluated, and documented to inform a recommended approach to household recruitment.

Consultant shall recommend methods for over-sampling groups of interest. Consultant shall include in recommendations specific strategies for reaching groups with special legal protections such as Title VI and Environmental Justice populations.

Funding for survey implementation is likely to include federal funding sources. Agency will investigate federal rules associated with the use of incentives for recruiting and advise on strategies for incentives which comply with such rules.

Consultant shall present sampling approach and recruitment strategies to Agency for feedback during monthly progress meetings. Consultant shall prepare Technical Memorandum #3: Sampling Approach and Recruitment Strategies and shall present Technical Memorandum #3 to Agency and TSS for feedback. Agency shall determine Technical Memorandum #3 final upon satisfaction of deliverable by TSS.

Deliverables:

- Technical Memorandum #3: Sampling Approach and Recruitment Strategies documenting:
 - Preliminary and final design of sampling approach and sample stratification scheme;
 - Evaluation framework for testing recruitment scheme;
 - Recommended household recruitment scheme.
- Work Session #6 with Agency and TSS, including:
 - Preparing agenda not less than 5 business days prior to each meeting, and
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Presenting Technical Memorandum #3
 - Preparing meeting notes, provided within 5 days following the meeting
- Integrate feedback from Work Session #6 and provide a final Technical Memorandum #3.

2.3 Develop Weighting Scheme

The desired survey design must entail sophisticated and complex post-stratification expansion weights using sound statistical methods. Consultant shall propose sampling expansion weights based on geographic and other relevant stratification variables.

Consultant shall identify and document the characteristics important for reporting, such as race, age, income, etc. Consultant shall present a proposed weighting scheme, including probability of selection and post-stratification weights, to Agency, and address Agency comments and feedback prior to summarizing recommendations in a technical memorandum. Consultant shall prepare Technical Memorandum #4: Weighting Scheme and shall present Technical Memorandum #4 to Agency and TSS for feedback. Agency shall determine Technical Memorandum #4 final upon satisfaction of deliverable by TSS.

Deliverables:

- Technical Memorandum #4: Weighting Scheme documenting:
 - Characteristics important for reporting, such as race, age, income, etc.
 - Proposed weighting scheme, including probability of selection and post-stratification weights
 - Preliminary and final design of sampling approach and sample stratification scheme;
- Work Session #7 with Agency and TSS, including:
 - Preparing agenda not less than 5 business days prior to each meeting, and
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Presenting Technical Memorandum #4
 - Preparing meeting notes, provided within 5 days following the meeting
- Integrate feedback from Work Session #7 and provide a final Technical Memorandum #4.

2.4 Develop Stratification Strategies

Geographic stratification will be appropriate at both a macro- and micro-level. At the macro-level, effective representation of the survey population is important (i.e., households in Oregon-southwest Washington, MPOs, remainder of Oregon). Interests at the micro-level may include geographic stratification that is associated with mode use, such as density, accessibility to activity opportunities, and mixed use. This type of micro-level geographic stratification may be defined qualitatively, such as levels of urbanization (very urban, urban, and suburban), or mathematically, such as an index of development density.

Consultant shall recommend geographic stratification strategies and determine whether additional stratification strategies, are required to minimize selection bias across significant subgroups in the population, such as zero-car households, low income households, minority populations, renters, in-migrants, etc. to Agency, and address Agency comments and feedback prior to summarizing recommendations in a technical memorandum. Consultant shall prepare Technical Memorandum #5: Geographic Stratification Strategies and shall present Technical Memorandum #5 to Agency and TSS for feedback. Agency shall determine Technical Memorandum #5 final upon satisfaction of deliverable by TSS.

Deliverables:

- Technical Memorandum #5: Geographic Stratification Strategies documenting:
 - Preliminary and final stratification strategy recommendations.
- Work Session #8 with Agency and TSS, including:
 - Preparing agenda not less than 5 business days prior to each meeting, and
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Presenting Technical Memorandum #5
 - Preparing meeting notes, provided within 5 days following the meeting
- Integrate feedback from Work Session #8 and provide a final Technical Memorandum #5.

2.5 Develop Methodology/Sample Sizes

Consultant shall recommend an optimal sampling design for each metropolitan area of the state as well as at the statewide level, including specifics on the population of inference, survey population, survey objectives, sampling approach, sample size and type, stratification variables, design parameters (respondent eligibility, and screening and interview non-response), the expected sample disposition table, and the sample management plan.

Methodology recommendations must also include a final timeline and budget for implementation of the survey, with specific timeframes and costs for survey activities in each participating metropolitan area.

Consultant shall summarize findings in a preliminary technical memorandum and present them to Agency. Consultant shall prepare Technical Memorandum #6: Survey Implementation Methodology and Sample Sizes and shall present Technical Memorandum #6 to Agency and TSS for feedback. Agency shall determine Technical Memorandum #6 final upon satisfaction of deliverable by TSS.

Deliverables:

- Technical Memorandum #6: Survey Implementation Methodology and Sample Sizes documenting:
 - Optimal sampling design;
 - Sample management plan;
- Work Session #9 with Agency and TSS, including:
 - Preparing agenda not less than 5 business days prior to each meeting, and
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Presenting Technical Memorandum #6
 - Preparing meeting notes, provided within 5 days following the meeting
- Integrate feedback from Work Session #9 and provide a final Technical Memorandum #6.

2.6 Survey Instrument Development and Testing

Consultant shall evaluate and propose a preliminary survey instrument for pilot testing. Consultant shall subject the preliminary survey instrument to pilot testing to ensure that the survey instrument and deployment/data collection technology have been properly vetted prior to implementation. Consultant shall present the results of the pilot testing to TSS and offer recommendations for the survey instrument to be implemented. TSS will review and provide feedback to Consultant for amending and/or modifying the preliminary survey instrument. Agency shall purchase survey instrument and data collection technology as needed.

Consultant shall develop and implement an outreach process designed to educate public officials and the general public about the survey effort to garner their support in reaching respondents and supporting recruitment.

Consultant shall summarize findings in a preliminary technical memorandum and present them to Agency. Consultant shall prepare Technical Memorandum #7: Survey Instrument and Consultant shall prepare Technical Memorandum #8: Outreach Process to Agency and TSS for feedback. Agency shall determine Technical Memorandums #7 and #8 final upon satisfaction of deliverable by TSS.

Deliverables:

- Technical Memorandum #7: Survey Instrument documenting:
 - Evaluation of survey instrument options;
 - Summary of preliminary survey instrument testing and findings;
 - Recommendation of survey instrument to be implemented
- Technical Memorandum #8: Outreach Process documenting;
 - Outreach process designed to educate and garner support

- Work Session #10 with Agency and TSS, including:
 - Preparing agenda not less than 5 business days prior to each meeting, and
 - Preparing PowerPoint slides and materials, not less than 5 business days prior to the meeting;
 - Presenting Technical Memorandum #7 and Technical Memorandum #8
 - Preparing meeting notes, provided within 5 days following the meeting
- Integrate feedback from Work Session #9 and provide a final Technical Memorandum #7 and final Technical Memorandum #8.

PHASE III

3. Survey Implementation

The Phase 3 statement of work will be defined upon completion of Phase II deliverables. Consultant shall anticipate the statement of work including but not limited to:

3.1 Project Management and Coordination

During Phase III, Consultant shall schedule, conduct and attend monthly progress meetings remotely with APM and/or others as identified by APM. Phase III will also remote coordination meetings with individual participating agencies (with remote attendance by APM) and remote meetings with TSS. Consultant shall schedule, conduct and attend all in-person and remote meetings.

Deliverables:

- Monthly progress reports submitted with Consultant's invoice, including:
 - Project status by task breakdown and percent complete;
 - Changes and reasons for any changes in schedule, work products, scope or team personnel; and
 - Unanticipated problems or issues that may delay the delivery schedule; and other relevant events or information.
- Progress Meeting preparation, attendance and documentation, including:
 - An agenda not less than 5 business days prior to each meeting, and
 - Meeting notes summarizing issues discussed, decisions made and future action items agreed to, provided within 5 business days following the meeting.

3.2. Implement Survey

Consultant shall implement survey based on materials prepared in previous phases. The complete set of data collection instruments, processes and supporting materials should be used for this phase. Consultant shall describe the survey implementation process in detail, including key milestones needed to determine whether the survey process requires modifications or refinements to the collection approach. Consultant shall identify how survey data will be actively monitored for quality control and quality assurance, with particular attention to meeting targeted sample goals, avoiding over-sampling of easy to reach populations, addressing under-sampling of hard to reach populations, and description of how data is retrieved and stored using methods reflecting recent advances in data collection.

Consultant shall prepare a Field Management Plan identifying how survey interviewers will be trained, field activity will be managed and the performance measures used to monitor progress and ensure sampling targets are met and bias kept to a minimum.

Given the proposed approach to the survey, Consultant shall prepare an estimated cost per household in order to support Agency budget management in the event insufficient funding is available at the time of data collection. Agency may request Consultant to provide alternative data collection timing in order to utilize available budget to the extent possible in a manner that aligns with the project goals and objectives. For example, data collection could occur over a longer time period, overall sample size could be reduced, or specific components of the implementation phase could be eliminated to reduce project cost.

Deliverables:

- Survey Implementation Plan
- Field Management Plan
- Cost estimates

3.3 Data Delivery and Summary Results

Consultant shall provide survey data in a form compatible with Agency software and travel demand model design related to tours, trips, stops, day-patterns, vehicles, and person-types. The dataset must be accompanied by a data dictionary, and files containing household data, person data, vehicle data, place data, and location/time data. Consultant shall prepare documentation summarizing the technical approach to all three phases of the survey effort.

Consultant shall prepare a statewide summary report based on the complete data set developed under the Implementation phase. The report must be written in a manner that provides understandable information to non-technical audiences, such as policy makers, planners and the general public. The information must be summarized and reported in a manner describing travel patterns observed in Oregon with respect to trip purpose, trip distances, number of trips and how they vary across household characteristics such as size, ages, geography and the like.

Deliverables:

- Technical documentation
- Statewide Summary Report
- Survey data files

Phase	Task
1	1.1 Project Management and Coordination
	1.2 Survey Work Planning
2	2.1 Project Management and Coordination
	2.2 Develop Sampling Approach and Recruitment Strategies
	2.3 Develop Weighting Scheme
	2.4 Develop Stratification Strategies
	2.5 Develop Methodology/Sample Sizes
	2.6 Survey Instrument Development and Testing
3	3.1 Project Management and Coordination
	3.2 Implement Survey
	3.3 Data Delivery and Summary Results

ATTACHMENT C - SAMPLE CONTRACT

The Sample Contract (including its terms, conditions and Exhibits) is not physically attached but incorporated into this RFP with the same force and effect as though fully set forth herein.

Attachment C is available as a separate file posted with this RFP at the following Website: <https://www.lcog.org/1127/8210/OHAS-RFP>; or may be requested by email from the SPC listed on page 1 of this RFP.

ATTACHMENT D - REFERENCE QUESTIONNAIRE

Attachment D is available is available for download at the following hyperlink:

<https://www.lcog.org/1127/8210/OHAS-RFP>

Attachment D may also be requested by email from the SPC listed on page 1 of this RFP.