

RFP Number	2021-02
RFP Title	Household Travel and Transit On-Board Survey for Ada and Canyon Counties, Idaho
Deadline for Submittal	March 19, 2021, 5:00 p.m. MST
Scope	See General Scope of Services section of request for proposal
Send Submittals to	Meg Larsen, Director of Operations COMPASS 208.475.2228 mlarsen@compassidaho.org
Direct Inquires to COMPASS Project Manager	Mary Ann Waldinger, Principal Planner COMPASS 208.475.2242 mwaldinger@compassidaho.org
Format of Submittals	<ol style="list-style-type: none"> 1. Electronic submittals in PDF format must be received by COMPASS by the date and time in the "Deadline for Submittals" section above. No exceptions. <ol style="list-style-type: none"> a. Total page limit is 20 pages. The introductory letter, project organizational chart, and resumes are not included in page count. b. Front and back cover pages are acceptable and do NOT count in the submittal. Cover pages shall only identify the consultant, sub-consultant(s) and project. 2. Send electronic submittals to Meg Larsen, Director of Operations mlarsen@compassidaho.org 3. Respondents are responsible for verifying receipt by COMPASS of the submittals
Questions and Revisions	<ol style="list-style-type: none"> 1. Submit questions no later than the date specified in the calendar below. 2. Questions must be sent via email to Mary Ann Waldinger at mwaldinger@compassidaho.org. <u>No phone calls or verbal questions will be accepted.</u> 3. Responses will be posted within three-full business days of receipt. 4. In the event that it is necessary to provide additional clarification or revisions to this RFP, COMPASS will post addenda to <i>Jobs and Contracts</i> (http://www.compassidaho.org/people/jobs.htm) webpage. It is the proposer's responsibility to regularly monitor the website for such postings.

Clarification of Submittals	<p>During the evaluation of submittals, COMPASS reserves the right to the following:</p> <ul style="list-style-type: none"> • contact any or all proposers for additional information for clarification purposes, • discard submittals which contain errors, or • waive disqualifying errors or gain clarification of error or information, at COMPASS' sole discretion.
RFP Calendar	<p>These dates are for planning purposes and represent COMPASS' desired timeline for this project. Any revision to the "Deadline for Submittals" will be made by addendum. All other dates may be adjusted without notice as needs or circumstances dictate.</p>

Date	Activity
February 23, 2021	Release RFP
March 11, 2021 5:00 p.m. MST	<p>Written questions are due. No questions will be accepted after this date. Responses posted within 3-full business days.</p>
March 19, 2021 5:00 p.m. MST	DEADLINE FOR SUBMITTALS
March 22-26, 2021	Submittal review and selection
March 31, 2021	Notification of selected consultants
Week of April 5, 2021	Anticipated contract approval and notice to proceed date
Week of April 12, 2021	Anticipated project kick-off meeting

REQUEST FOR PROPOSAL
RFP 2021-02
Household Travel and Transit On-Board Survey
Covering Ada and Canyon Counties, Idaho
Community Planning Association (COMPASS)

Background and Project Description

The Community Planning Association of Southwest Idaho (COMPASS), the metropolitan planning organization for Ada and Canyon Counties, is seeking a qualified consultant to develop, test, and implement a household travel survey throughout the COMPASS planning region, and concurrently conduct an on-board transit survey of Valley Regional Transit’s (VRT) public transportation system.

Study Area

The study area includes Ada County and Canyon County as shown in Figure 1. Ada and Canyon Counties are in southwest Idaho’s Treasure Valley - the most populous area in the state, growing from a population of 581,288 in 2010 to an estimated 737,790 in 2020. Rapid growth experienced over the past several decades, completion of major transportation infrastructure projects, and recent changes to the local and national economies have influenced people’s travel behavior.

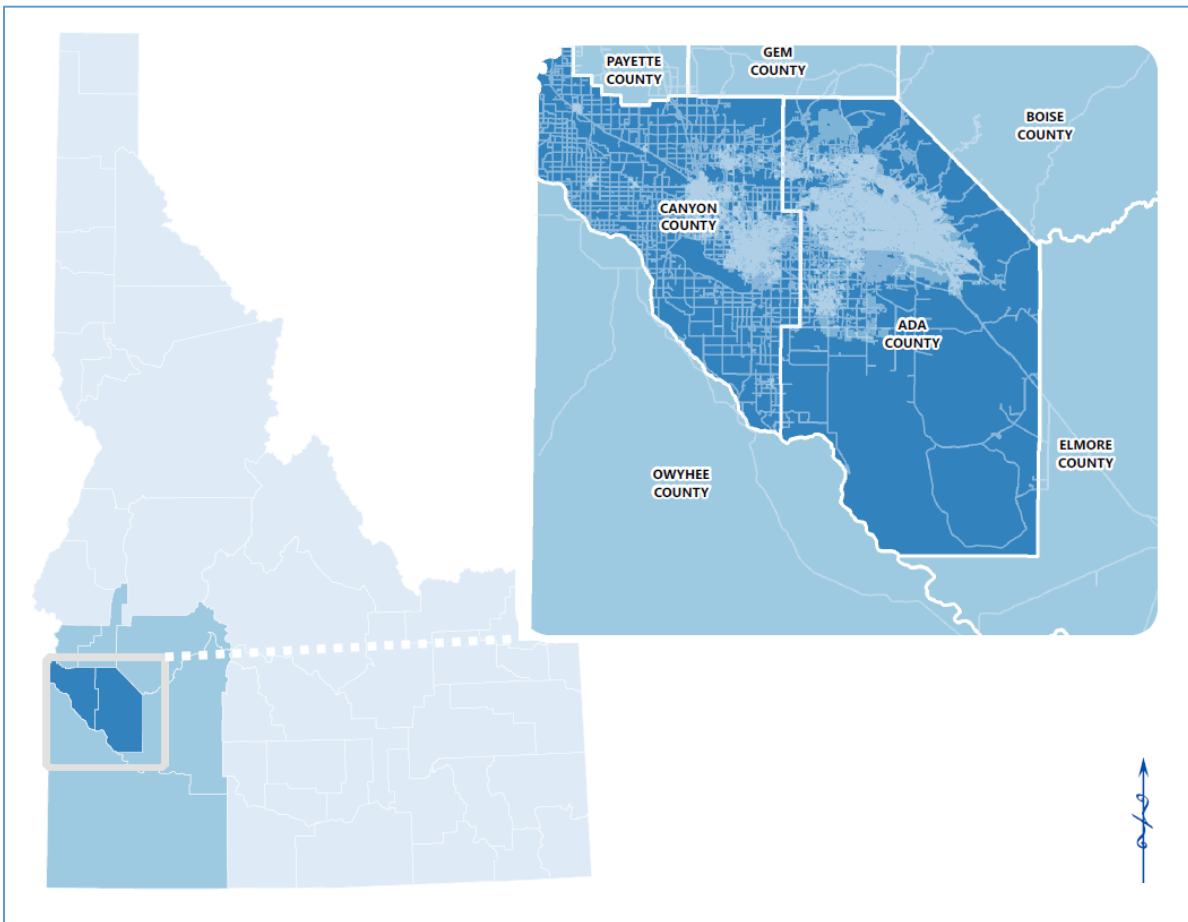


Figure 1: Study Area

Overview

The last regional household travel survey for the COMPASS planning area was completed in 2012. Since that time, the region has changed significantly in terms of growth, increased prevalence of newer transportation options (e.g. ride hailing and micro-mobility services), and a recent increase in employers' amenability to teleworking. The purpose of a new travel survey is to get a more current snapshot of trip characteristics and travel behaviors in the region.

In late 2015, an update to the 2010 on-board transit passenger survey was completed for COMPASS and VRT. The purpose of these on-board surveys was to collect data to refine and calibrate the mode choice component of the regional travel demand model. Both of these previous surveys had two components – 1) collect passenger boarding and alighting counts on all routes and 2) obtain travel behavior characteristics and demographic data from a representative sample of passengers using VRT's fixed route system. Since then, VRT has implemented automatic passenger counters (APC). However, collecting boarding and alighting counts may still be a data collection component if deemed necessary for data expansion.

Data collected from both of these new surveys will be used to update and recalibrate the regional travel demand model and other technical tools, and support transportation planning requirements and activities.

This RFP is for data collection only and does not include any travel demand model work.

Proposals must be prepared and submitted in accordance with the guidelines and requirements outlined in this request for proposals (RFP).

Interested firms must demonstrate knowledge and experience in regional household travel surveys and transit on-board surveys. The final report and all deliverables must be completed and submitted to COMPASS within 14 months from the contract execution date/notice to proceed. However, given the uncertainty caused by novel coronavirus-2019 (the pandemic) COMPASS reserves the right to work with the selected team and adjust the schedule if necessary. Proposals will be evaluated based on their ability to meet the qualifications and selection criteria. **The budget for the Household Travel and Transit On-Board Survey project is \$850,000.**

General Scope of Services

The scope of services includes the following critical elements. Each shall be addressed in proposals:

- Public awareness
- Sampling and participant selection
- Survey design
- Types of data collected
- Data collection methodologies
- Understanding teleworking and home delivery behaviors
- Attention to data privacy
- Participation incentives
- Addressing and overcoming challenges
- Consideration and use of third party data

Public Awareness

Public participation is a key component of this project. The reliability of the data obtained from these surveys will depend heavily on the level of attention dedicated to them by participants. Outreach efforts should communicate the purpose and importance of participation and should encourage participants to commit to surveys throughout the project duration, and to provide thoughtful feedback as necessary.

Proposals should provide an overview of public outreach strategies that include close coordination with COMPASS' Communications Team.

Sampling and Participant Selection

The number and type of sample household and rider participants should be statistically significant and representative of the study region. Proposals shall summarize a plan to determine the appropriate sample sizes for each survey and how they will ensure good regional representation. Sample sizes must be appropriately greater than the sample size of the previous household travel survey effort (see [Links to Additional Resources](#)). Data collection for the household survey could start as early as spring 2021 and extend into fall 2021, or until the sample targets are met. Data collection through summer months should be limited for obvious reasons – vacations, no school, different travel behaviors, faster travel times, etc. However, COMPASS is still open to summer data collection as an option if deemed necessary.

The consultant will work closely with COMPASS to determine sampling targets by area given the agency's local knowledge and experience. Available data from COMPASS and/or the American Community Survey (ACS) will be utilized. The on-board survey will require close coordination with VRT and use the latest available route-level ridership data. Given the size of VRT's public transportation system, 23 routes with approximately 3,500 weekday boardings, the overall sample size must yield at least 700 completed / useable surveys. This is necessary to ensure enough high-quality data for COMPASS staff to refine and recalibrate the mode-choice component of the regional travel demand model. The on-board survey shall be conducted in the fall of 2021, allowing for additional recovery time for general travel behaviors to stabilize, and to regain rider confidence in public transportation.

Data collection efforts conducted in fall 2021 must be complete by November 12, 2021.

Survey Design

The surveys will be designed to collect household, person, and trip-level data needed for COMPASS staff to update the regional travel demand model (four-step trip based model) and be comparable, to some degree, with previously collected data.

The scope of work shall include pilot surveys that allow for testing, additional review of survey design and adjustments prior to final survey administration.

The final survey will cover, at a minimum, three consecutive workdays avoiding holidays or other events, such as school breaks, that can cause significant short-term changes to typical travel behavior. While weekend travel behavior is not the focus of this effort, some weekend data may be collected in the process and should not be discarded. For example, a respondent's travel "diary" may commence on a Friday and continue through the weekend to reach the required number of consecutive workdays.

Types of Data Collected

At a minimum, both surveys need to collect household and person-level information necessary to validate data or model development. Some examples of types of data to collect include, but are not limited to, the following:

- Home address – only to the extent necessary to accurately place in TAZs (see [Links to Additional Resources](#))
- Household size
- Household income
- Household workers
- Housing type (single family home, duplex, condo, townhome) and tenure
- Household vehicles available
- Age
- Gender
- Driver's license status (15 years and older)
- Employment status, occupation and industry (15 years and older)
- Disability status
- School enrollment status
- Limited English proficiency
- Smartphone ownership

VRT is interested in questions related to rider satisfaction at the conclusion of on-board surveys. Therefore, proposals must address how to accommodate this possibility.

Types of trip-level information needed vary between the household travel survey and the on-board survey. The household survey needs to collect information that describes all trips taken by all household members throughout the study period. The on-board survey needs to collect information that describes complete transit trips from initial boarding to final alighting on a one-way trip including any connections.

Data Collection Methodologies

Proposals should clearly explain means and methodology for collecting survey data. If cell phone applications are the proposed primary means of collecting survey data, an explanation should be provided for ways to mitigate loss of information in areas in the region where cellular coverage is limited or unavailable.

Understanding Teleworking and Home Delivery Behaviors

Teleworking trends continue to change over time. The region has seen a drastic change in teleworking habits and employer amenability to work-from-home options in the last year. COMPASS seeks to gain insight into the impacts of teleworking on trip behavior and whether or not current trends will continue in the future.

Additionally, COMPASS seeks to gather data related to trips that are attracted to households such as home deliveries and services.

Some survey questions will be dedicated to these topics.

Attention to Data Privacy

Proposals must address data security protocols and how personally identifiable data (e.g. home address) collected for this project will be protected from disclosure.

Participation Incentives

Proposals should consider ways to help incentivize complete survey participation.

Addressing and Overcoming Challenges

Challenges in the survey administration process are inevitable. Proposals shall provide examples of past challenges encountered in similar surveys and how those challenges were mitigated or overcome.

Additional challenges may be encountered due to the disruptive nature of the pandemic. The consultant must address this in the proposal and provide options to overcome these challenges.

Consideration and Use of Third-Party Data

Third-party data sources may be used to supplement survey data. Proposals including the use of such data shall provide an explanation of which third-party data sources will be used along with an explanation of how they will be used. If third-party data sources are not proposed, reasoning must be provided.

One application of third-party data may be to help understand external trips – those originating outside Ada or Canyon County but destined somewhere in the area (external – internal) and those passing through (external – external).

Project Deliverables

The project deliverables and acceptable formats for each task are shown below:

1. Overall work plan and project schedule (Word, PDF)
 - a. Project work plan, including proposer’s staffing plan and assignments, and schedule for tasks and deliverables
2. Sampling Plan
3. Public outreach, marketing, and participant recruitment strategy (Word, PDF)
4. Survey administration plans (Word, PDF)
5. Monthly progress reports and invoices
6. Kickoff meeting and periodic team meetings
7. Survey pilot/pre-tests with opportunity for refinement
8. Comprehensive database/s of data collected (electronic database format)
9. Weighting and expansion rates will be developed by COMPASS in close coordination with the consultant.
10. Analysis of results

11. Final report (Word, PDF)

- a. The final report must clearly summarize the results of the concurrent surveys. Raw data and any analyses or summaries shall be submitted with the final report.

Submittal Requirements

The submittal for the Household Travel and Transit On-Board Surveys shall include the following:

- A. Introductory letter: Introduction of submittal, identification of the project manager, contact information (physical address, telephone number, and email) and a statement describing the key personnel the proposer will commit to the project to meet COMPASS' quality and schedule expectations. The Introductory Letter shall include a statement regarding the Professional Services Agreement as described below in III-B.
- B. Professional Services Agreement: Provide a statement that the sample Professional Services Agreement (sample attached in Appendix A) has been read, that the proposer will meet the prerequisite insurance requirements, and the proposer, if selected, agrees to the terms and conditions of the agreement. If proposers have questions about the terms and conditions of the agreement, they should submit as a written question by March 11, 2021 at 5:00 pm MST.
- C. Proposer Qualifications and Relevant Experience: Discuss the proposer's qualifications, experience and history with corridor operations plans. Describe the proposer's project management systems including reporting, billing and QA/QC processes.
 - a) Provide information summarizing **relevant** qualifications and experience of the project manager and brief resumes of the key staff that will be directly involved in this project. Include a brief description of the role of individuals in the referenced projects.
 - b) Provide an organizational chart of all members of the proposed consultant project team that will be working on the project, including sub-consultants, if applicable.
- D. References: Provide references for three directly applicable projects with current contact information.
- E. Sub-consultants: List all sub-consultants that will be directly involved in this project.
 - a) Identify the role of the sub-consultant(s)
 - b) Include the sub-consultant(s) relevant qualifications, and experience as described in items III-C above. References and resumes are not required for sub-consultants.
- F. Project Approach/Work Plan: Discuss the approach, work plan and proposed schedule of the project as per deliverables and scope of services provided in [General Scope of Services](#) Section of this RFP. Highlight any innovative approaches proposer would take that would benefit the project. Also, address the proposed project communication plan.

- G. Questions: See page 2 for instructions regarding any questions about this RFP.
- H. Total page limit is **20 pages**; introductory letter, organizational chart, and resumes are not included in page count.
- a) Front and back cover pages are acceptable and do NOT count in the submittal. Cover pages shall only identify the proposing consultant, sub-consultant(s) and RFP title.
- I. Electronic submittals in PDF format must be received by COMPASS by the date and time in the "Deadline for Submittals" section. Late submittals will not be accepted.
- a) Submittal must be consolidated into one PDF file of 15MB or less. Zipped files are not recommended.
 - b) Send electronic submittals to Meg Larsen, Director of Operations mlarsen@compassidaho.org by 5:00 pm MST on March 19, 2021 as described in the "Deadline for Submittals" section on page 1.
 - c) Include "Household Travel and Transit On-Board Surveys Submittal" in the subject line of the electronic submittal.
 - d) Respondents are responsible for verifying receipt by COMPASS of the submittal. If you do not receive an email response verifying receipt of submittal, call Meg Larsen at 208.475.2228 before the deadline on page 1. Without an email verification of receipt, do not consider submittal as received.

Evaluation and Selection Process

Submittals to this RFP will be evaluated on the following criteria:

- A. Proposer Qualifications, Relevant Experience, References: **30 points**
 - a. Demonstrated experience with successful execution of household travel surveys and transit on-board surveys
 - b. Experience with and understanding of survey development and administration
 - c. Knowledge of and demonstrated experience with current public and private transportation trends, travel behaviors, and trip characteristics
 - d. References from previous clients
- B. Project Team Staff/ Project Manager: **15 points**
 - a. Proposed project team staff ability and record of achievement, particularly the qualifications and experience of key supervisory personnel and their commitment to the project.
 - b. Provide the availability of the staff on the proposer team to take on work tasks to meet the project completion date according to the proposed schedule.
 - c. Demonstrate previous successful collaboration among the proposing consultant team by providing a list of at least two projects collaborated on within the past five years.
- C. Project Approach: Scope of Work/Work Plan: **25 points**

- a. Proposed project approach, overall work plan and schedule demonstrates a full comprehension of the scope of services, and the ability to provide services at a high performance level and meet project requirements.
 - b. Project approach and work plan demonstrates ability to address potential key challenges with the project and includes innovative ideas for approach, deliverables, etc. to meet the project objectives.
- D. **Quality of Proposal: 15 points**
- a. Equal and appropriate level of detail for both survey efforts.
 - b. Quality and thoroughness of the submittal in addressing the project objectives contained in this RFP.
 - c. Schedule, tasks, and deliverables are clearly laid out.
- E. **Project Management: 10 points**
- a. Demonstrated ability to manage the project and successfully complete it on time based on proposed schedule, organizational structure of the project team, and availability and location of consultant team. Past projects and references should be used to demonstrate appropriate stakeholder involvement and internal controls.
- F. **Project Cost: 5 points**
- a. The budget for the Household Travel and Transit On-Board Survey project is \$850,000 and the award will be a flat fee / not to exceed amount. Respondents are encouraged to provide fees per task that relate back to the information provided under Item C: Project Approach.

Links to Additional Resources

- [2012 COMPASS Regional Household Travel Survey Report](#)
- [On-Board Transit Survey, 2010](#)
- [On-Board Transit Survey, 2015](#)
- [Valley Regional Transit Fixed Route System](#)
- [Transportation Analysis Zones \(TAZs\)](#)