

Skagit Council of Governments

Request for Proposals

For: Household Travel Survey

PROCESS SCHEDULE

Issue Request for Proposals:	September 5, 2019
Written Questions Deadline:	September 19, 2019
Submittal Deadline:	October 3, 2019
Interview Finalists (if necessary):	October 14-15, 2019
Notify Finalists of Decision:	October 17-18, 2019
Estimated Contract Execution:	October 28-31, 2019



9/5/2019

A. BACKGROUND INFORMATION

The Skagit Council of Governments (SCOG) is a voluntary organization of local governments within Skagit County whose purpose is to foster a cooperative effort in resolving problems, policies and plans that are common and regional. SCOG is the metropolitan planning organization and regional transportation planning organization in Skagit County, Washington. There are 126,520 people residing in SCOG's metropolitan planning area in 49,262 households, according to the most recent state and federal estimates.

SCOG is initiating a request for proposals (RFP) from qualified firms for preparation of a household travel survey. This RFP is only open to those qualified firms or individuals who satisfy the requirements stated herein and who are licensed and available to do business in Washington state. SCOG has a budget of up to \$200,000 available for this project.

It is anticipated that an agreement will be executed by SCOG and a firm or individual for this project, with an approximate 12-month term. The agreement start date is anticipated to be in November 2019 and end date in October 2020.

The household travel survey contract will be funded through a Surface Transportation Block Grant Program grant, and all applicable state and federal laws must be followed. Proposers must be familiar and comply with Washington State Department of Transportation's [Local Agency Guidelines Manual](#). This household travel survey contract is subject to the appropriations of the State of Washington.

B. PROJECT OVERVIEW

This project is the preparation of a 2020 household travel survey in Skagit County, Washington with the primary purposes of providing updated information for the region's travel demand model, including potential future expansions to the model, and an upcoming 2020-2021 update to the metropolitan-regional transportation plan.

SCOG now uses the [2008 North Sound Travel Survey](#) to calibrate the regional, macroscopic travel demand forecast model maintained by SCOG. The travel demand model is an aggregate, trip-based, three-step model with trip generation, trip distribution and network assignment. Mode split is not currently modeled. The trip generation step uses cross-classification analysis groups for income and household size. The trip distribution step uses a gravity model, and network assignment step uses equilibrium assignment. Only the weekday p.m. peak period is currently modeled, no other time periods nor weekends are modeled. The model is used in the preparation of the metropolitan-regional transportation plan, corridor studies, general research activities

and other regional projects. More information on the model is included in SCOG's [Travel Demand Model Documentation](#).

An assessment of the current regional travel demand model is planned for 2022–2023. It is anticipated that the results of the household travel survey will inform that assessment and may lead to changes in regional modeling practices. The household travel survey should collect data that should be useful to a future model, even if these data cannot be utilized in the current regional travel demand model.

At a minimum, the information from the survey must support the calculation of:

- Trip production rates by trip purpose;
- Trip distribution by time of day;
- Trip length frequency distribution;
- Mode share of travel;
- Travel time; and
- Origins and destinations by geographic area.

Additional aspects of the household travel survey project include:

- Alignment of data collection timeframe with 2020 Decennial Census;
- Targeted oversampling of low-income populations, racial and ethnic minority populations and persons with limited English proficiency;
- Inclusion of perception and stated preference questions in the survey component in addition to the revealed preference data from the travel diaries;
- Data collection in excess of what is now modeled at SCOG (e.g. time of day, weekend, mode split), but may be utilized in a future model update; and
- Collection and analysis of passive data under the contract to inform the household travel survey and future modeling activities.

It is anticipated that the project will be completed over a 12-month contract period.

C. SCOPE OF SERVICES

The general scope of work for this contract is expected to include the tasks in this section. Proposers are strongly encouraged to consider best practices in conducting household travel surveys, review data needs of SCOG's travel demand model, and suggest changes in the Scope of Services section if warranted.

TASK 1: PROJECT MANAGEMENT

Monthly reports of progress shall be submitted to SCOG documenting work completed for the prior month. Monthly invoices shall be submitted to SCOG for work completed in the prior month.

The contractor will provide quality control and quality assurance of all products prior to delivery to SCOG.

The contractor will conduct a kickoff meeting with SCOG at SCOG offices and provide a final presentation in Skagit County prior to completion of the contract term.

Project coordination phone calls are expected to occur no less than monthly between the contractor and SCOG, with greater frequency as necessary for successful project administration.

TASK 1 CONTRACTOR DELIVERABLES:

- A. MONTHLY PROGRESS REPORTS AND INVOICES;
- B. KICKOFF MEETING; AND
- C. FINAL PRESENTATION.

TASK 2: PUBLIC ENGAGEMENT

Communicating the project to the public, and participants in the household travel survey, is an integral component of project success. A memorandum documenting the public engagement strategy shall be prepared by the contractor and provided to SCOG.

At a minimum, the public engagement memo shall include consideration and discussion of the following elements:

- Ensuring effective participation of low-income, racial and ethnic minority, and limited English proficiency populations;
- Addressing expected concerns about privacy and government distrust;
- Proposed tools of public engagement (e.g. website, smartphone application, telephone, mailings) and methods using these tools; and
- Proposed timeline of public engagement by month of engagement activities.

At a minimum, all public engagement materials must be made available in both English and Spanish. Foreign language assistance should be available upon request.

TASK 2 CONTRACTOR DELIVERABLES:

- A. PUBLIC ENGAGEMENT MEMORANDUM.

TASK 3: SURVEY DESIGN AND SAMPLING PLAN

The contractor will prepare a survey design and sampling plan to be used for the household travel survey. A target sample size has not been established. The sample must be statistically significant and unbiased, including targeted oversampling of certain populations and provide a scientifically valid sample that can be expanded to accurately represent the region.

At a minimum, the following socioeconomic and demographic information should be considered in preparation of the survey questionnaire, and correspond with U.S. Census Bureau definitions and classifications, where practicable:

- Home address;
- Household size;
- Household income;
- Household workers;
- Housing type and tenure (owner/renter);
- Household vehicles available;
- Age;
- Gender;
- Ethnicity;
- Race;
- Driver's license status (16 years and older);
- Employment status, occupation and industry (16 years and older);
- Disability status;
- Educational attainment;
- School enrollment status;
- Limited English proficiency; and
- Smartphone ownership and landline status.

The survey must include travel diaries for no less than one, 24-hour weekday period (Tuesday, Wednesday, or Thursday). Preferably two, 24-hour weekday periods and one weekend, or up to seven consecutive days would be captured in travel diaries. Though not currently modeled, travel behavior information for time periods throughout a weekday, and weekend total data should be collected within available budget. P.m. peak is the only time period currently modeled at SCOG, with 4–6 p.m. as the modeled period of peak volumes during a typical weekday.

The survey will include perception and stated preference questions examining regional priorities for the transportation system; transportation finance tradeoffs; telecommuting preferences; and online shopping and home deliveries. The primary purpose of these questions is to provide scientifically valid public opinion of regional transportation priorities to inform the 2021 update of the metropolitan-regional transportation plan. It

is anticipated that there will be 5–10 of these questions, to accompany the demographic and socioeconomic questions of the household travel survey. SCOG will provide draft perception and stated preference questions to the contractor, and both will work to ensure that questions are clear and scientifically valid. The survey pilot/pretest may warrant revisions to these questions, along with other questions included in the survey.

Monetary incentives should be considered in the survey design and their anticipated impact on response rates. Although budgeted federal funds cannot be used as monetary incentives, there is an opportunity to include funding from another source for the project. If recommended by a proposer, examples of monetary incentives from other projects, methods of payments, procedures for payment and other related aspects of this feature should be included to provide a rationale for why incentives should be considered for the household travel survey.

The contractor shall consider and recommend whether or not to sample different geographies within the metropolitan planning area. These could include two distinct sampling frames using 23 USC 101(a) definitions of Urban-Rural areas approved by the Federal Highway Administration, for areas over-under 5,000 population, or sampling the four cities and surrounding urban growth areas (boundaries designated pursuant to Washington state law) as one geographic area with all other areas as another. The 2008 North Sound Travel Survey sampled Skagit County along with a neighboring county as one sampling frame. The 2020 survey will not include two counties, and may have more than one sampling geography within the metropolitan planning area, as project resources and anticipated benefits to the survey allow.

TASK 3 CONTRACTOR DELIVERABLES:

A. SURVEY DESIGN AND SAMPLING PLAN.

TASK 4: PASSIVE DATA COLLECTION AND ANALYSIS

Part of this contract includes collection of passive data, either through procurement of third-party passive data, or collected directly by the contractor or a subcontractor without the need for a third-party contract. These passive data must be provided to SCOG to supplement other data gathered through the household travel survey, while maintaining data confidentiality restrictions. The passive data should correspond with the survey data collection as closely as possible, preferably using the same time period as the travel dairies.

SCOG expects a future use of these passive data will be for model calibration and validation purposes. For SCOG, passive data may be most valuable for external trip calculations (external-external, external-internal and internal-external); trip distribution by trip purpose; and travel time data between zones. Proposals should consider these

expected uses of passive data in preparing the proposal. If the proposer does not propose to collect and analyze passive data useful for these purposes, the proposal should include a rationale for why not, along with a brief discussion of anticipated weaknesses of these data for the expected uses described.

Passive data should be considered for expansion of the sample data to the regional population, if practicable. If there are areas where these passive data could supplement and improve upon information collected separately through the household travel survey, methods should be employed and documented for incorporation of these passive data into the regional expansion. Suggestions for how passive data may be used in this manner should be included in the proposal, along with any relevant experience in successfully using passive data as a tool in sample expansion. If passive data is not used to expand the survey, the rationale for not doing so should be documented in the draft and final reports.

The proposal should include suggestions of how passive data could be provided to SCOG including: format of the data; examples of providing passive data to others for similar projects; and a description of what applications would be necessary to view, query and analyze the data. Passive data should be provided with geographic information as practicable, while maintaining confidentiality.

Passive data collection is included within the scope and anticipated budget for the project. If third-party passive data collection is necessary, the contractor is expected to procure the data directly from another source and make available to SCOG as part of the contract.

TASK 4 CONTRACTOR DELIVERABLES:

- A. DOCUMENTATION OF PASSIVE DATA COLLECTED AND ANALYZED IN DRAFT AND FINAL REPORTS.

TASK 5: SURVEY PILOT/PRETEST, EVALUATION AND SURVEY REFINEMENT

Prior to conducting the survey, a pilot/pretest will be administered to evaluate the draft survey instrument, procedures and protocols proposed for the survey. Refinements generated during the pilot/pretest shall be used in preparing the final survey instrument and adjusting procedures and protocols in response to findings.

TASK 5 CONTRACTOR DELIVERABLES:

- A. SURVEY PILOT/PRETEST MEMORANDUM WITH EVALUATION RESULTS AND RESULTING SURVEY REFINEMENTS; AND
- B. FINAL HOUSEHOLD TRAVEL SURVEY INSTRUMENT.

TASK 6: SURVEY EXECUTION

Travel diaries are to be conducted in March or April 2020, aligning with planned 2020 Decennial Census mailings, and must be conducted when local schools and Skagit Valley College are in session.

Other survey information should be collected prior to the March/April travel diaries timeframe. This includes socioeconomic, demographic, perception and stated preference information, as well as any other information needed from participants in excess of what is expected from the travel diaries.

TASK 6 CONTRACTOR DELIVERABLES:

A. EXECUTION OF HOUSEHOLD TRAVEL SURVEY.

TASK 7: REPORT AND SUPPLEMENTAL MATERIALS

A draft report shall be prepared and submitted to SCOG for review and comment no fewer than 30 days prior to final report preparation. SCOG will conduct a timely review of draft materials and provide comments back to the contractor.

The draft and final reports shall include the following elements at a minimum, either within the report or as supplemental materials accompanying the report:

- Executive summary introducing project and summarizing key findings from the household travel survey;
- A summary of SCOG's travel demand model and applicability of household travel survey results to potential for future model expansion;
- Survey results including summaries of key travel behavior variables and pertinent socioeconomic and demographic factors for the region;
- An analysis of statistical reliability of survey results and applicability for model development;
- Results of perception and stated preference survey questions;
- Passive data collection and analysis, including recommendations for using these data for future modeling activities at SCOG. Passive data may also be used for expanding the sample to regional population, if warranted;
- Tables and charts displaying data included in the survey results, with data presented in graphical format whenever practicable;
- Methodology, protocols and procedures element, including expansion documentation from survey sample to regional population.

All survey data files, both raw and summary, shall be provided to SCOG along with their associated documentation.

Confidentiality of data collected shall be maintained.

TASK 7 CONTRACTOR DELIVERABLES:

- A. DRAFT REPORT;
- B. FINAL REPORT;
- C. SUPPLEMENTAL REPORT MATERIALS; AND
- D. ALL SURVEY DATA.

D. QUALIFICATIONS

Proposers must have demonstrated experience in performing household travel surveys, with a minimum of five years' experience of a principal project team member in conducting similar surveys and scopes of work. Proposers must demonstrate successful experience with targeted oversampling of low-income populations, racial and ethnic minority populations and persons with limited English proficiency.

E. PROPOSAL SCORING CRITERIA AND CONTENT

Proposals will be scored using the following criteria:

1. QUALIFICATIONS - 30%

- A. Provide name, address and telephone number of the firm or individual;
- B. List similar relevant projects and where to view them;
- C. Names of project team members, professional certifications/registrations and relevant experience of each; and
- D. References, including names and phone numbers of contact persons.

2. APPROACH - 50%

- A. Provide a detailed scope of work and describe how it will be accomplished. This scope should follow the tasks in Scope of Services section of the RFP.
- B. Proposers are strongly encouraged to consider best practices in conducting household travel surveys, review data needs of SCOG's travel demand model, and suggest changes in the Scope of Services section if warranted.

3. BUDGET - 10%

- A. Provide a budget that includes billable hours, cost per hour, and hours per task for each individual on the contractor team, including subcontractors.

4. SCHEDULE - 10%

- A. Provide a project schedule that includes all scope of work tasks, milestones and deliverables.

Proposals must total no more than 15 pages. A cover letter does not count toward the 15-page maximum and dividers do not count as pages if they do not contain content (text, pictures, graphic, etc.) other than what is necessary to identify the section of the proposal. Front and back covers of the proposal also do not count toward the 15 pages.

Submit four paper copies of the proposal by the submittal date. An electronic copy may be submitted in-lieu of the paper copies.

F. CONTRACT TERM

The contract is anticipated to begin in November 2019 and end in October 2020. Any contract extension must be mutually agreed by the contractor and SCOG.

G. SUBMITTAL AND SELECTION PROCESS

Proposals must be received by **5:00 p.m.** (PDT) on **October 3, 2019**. It is anticipated that submitted proposals will be evaluated within one week of the submission deadline. SCOG expects to make the selection decision after evaluating written proposals and contacting references. If SCOG determines that interviews are warranted, any interviews with prospective individuals or firms will be scheduled for **October 14-15, 2019**. A teleconferencing option will be provided to reduce travel time and costs. After interviews, references will then be contacted and a firm or individual will be selected to undertake the project.

Proposals will be reviewed based upon the qualifications of the personnel assigned to the project and experience with similar projects, project approach, schedule and budget. Proposals will be evaluated by a review team selected by SCOG to determine which proposal, if any, would be in the best interest of SCOG.

SCOG reserves the right to accept or reject any or all proposals received from this RFP, or to negotiate separately with any proposer, and to waive any informalities, defects, or irregularities in any proposal, or to accept that proposal or proposals, which in the judgment of the proper officials, is in the best interest of SCOG.

This RFP includes the Scope of Services in Section C to be performed, which should be used as the general basis for the proposal. Variations or alternative approaches are welcome. Proposals which do not include all requested information listed in Section E may be considered non-responsive. All proposals will become a part of the public file on this matter without obligation to SCOG.

H. INTERPRETATION OF RFP PRIOR TO PROPOSAL

Any person may request interpretation, clarification or correction of this RFP. Requests may be made to clarify intended meaning of any part of this solicitation, or to correct any discrepancies or omissions identified in the specifications. Such request must be in writing (letter or email) and must be delivered to the SCOG contact person no later than **5 p.m.** (PDT) on **September 19, 2019**. The person submitting the request is responsible for its timely delivery. Any interpretation, clarification, or correction to the RFP will be made by written addendum and will be available on the homepage of SCOG's website (www.scog.net), under "Recent News".

Any questions concerning this solicitation should be directed during the hours of 8:00 a.m. and 5:00 p.m. (PDT), Monday through Friday, to:

Mark Hamilton, AICP
Senior Transportation Planner
315 South Third Street, Suite #100
Mount Vernon, WA 98273
Telephone: (360) 416-7876
Email: markh@scog.net

I. POST-CLOSING DISCUSSION

Conversations may take place between SCOG and proposers after the responses are opened, for purposes of clarification. Proposers will be held to the information submitted in their proposals and subsequent negotiations.

Those submitting proposals may be required to make a presentation to SCOG as part of the selection process. The presenter shall be the person within the proposer's organization who is responsible for the transportation planning service.

J. INCURRED COST

This RFP does not obligate SCOG to award any contract. SCOG will not be held responsible for any cost or expense that may be incurred by the proposer in preparing and submitting a proposal in response to this RFP, or any cost or expense incurred by the proposer before the execution of a contract agreement. The proposer shall be solely responsible for any and all costs associated with submitting a proposal including any and all cost associated with interviews. No claims shall be submitted to SCOG for preparation or presentation of proposals.

All expenditures under any contract are subject to eligibility requirements in the SCOG-Washington State Department of Transportation Agreement, as well as all applicable state and federal laws.

K. PROTEST OF CONTRACT AWARD

Protests concerning the contractor selection process must be delivered in writing to SCOG within 14 calendar days of the award announcement. SCOG will review the protest, contact the parties involved, and recommend the appropriate action to the SCOG Transportation Policy Board. The Board's decision will be the final SCOG position. The final decision will be presented to all interested parties within forty-five (45) calendar days of receipt of the protest.

L. ASSIGNMENT

The awarded contractor shall not assign, transfer, convey, sublet, or otherwise dispose of any award or of any of its rights, title, or interests therein, without the prior written consent of SCOG.

M. ADDITIONAL LANGUAGE

SCOG reserves the right to introduce additional terms and conditions at the time the final Contract is negotiated. Any additional terms or conditions would be limited to ones having the effect of clarifying the RFP language and/or correcting defects, such as omissions or misstatements, which are discovered after the RFP is issued, or that reflect state or federal law changes, or as required by funding entities.

N. PROPOSER'S RESPONSIBILITY

By submitting a proposal, a firm or individual represents that:

1. The proposer has read and understands the RFP, and the proposal is made in accordance therewith;
2. The proposer is familiar with the local conditions under which this proposal must be performed. The proposer possesses the capabilities, resources, and personnel necessary to provide efficient and successful service; and
3. It is understood, and the proposer agrees, that the proposer shall be solely responsible for all services provided.

Each proposer shall be responsible for reading and completely understanding the requirements and specifications contained herein. The deadline for submission of proposals will be strictly adhered to. Late proposals will not be considered.

O. CONTRACT REQUIREMENTS

The successful contractor will be required to enter into a contract with SCOG as per the provisions of Local Agency Agreement 9417 (Agreement), project number STPUS-2029(053), a copy of which is available at the SCOG office and is included in Appendix A of this RFP. Through this reference, all the provisions within the Agreement are made a part of this RFP.

P. PROFESSIONAL LIABILITY INSURANCE

Upon selection, the proposer shall be responsible for providing proof of professional liability insurance coverage for errors and omissions in the proposed work. The coverage should amount to at least \$1,000,000.

Q. TITLE VI ASSURANCES

The Skagit Council of Governments, in accordance with Title VI of the Civil Rights Act of 1964 and 78 Stat. 252, 42 USC 2000d-42 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 bidders that it will affirmatively ensure that any contract entered into pursuant to this advertisement, disadvantaged business enterprises as defined at 49 CFR Part 26 will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, national origin, or sex in consideration for an award.

R. MAILING ADDRESS

Proposals must be **received** by **5:00 p.m.** (PDT) on **October 3, 2019**. Late proposals will not be accepted. Four copies of the proposal should be mailed to:

Mark Hamilton, AICP
Senior Transportation Planner
Skagit Council of Governments
315 South Third Street, Suite #100
Mount Vernon, WA 98273

Alternatively, proposals may be emailed to markh@scog.net.

APPENDIX A