

## CHECKLIST TO DESIGNATE AREAS OF EVALUATION FOR REQUESTS FOR PROPOSAL (RFP)

	REQUISITION NUMBER	DUE DATE	TIME DUE
MDOT PROJECT MANAGER	JOB NUMBER (JN)	CONTROL SECTION (CS)	
DESCRIPTION			
<b>MDOT PROJECT MANAGER:</b> Check all items to be included in RFP  WHITE = REQUIRED GRAY SHADING = OPTIONAL  Check the appropriate Tier in the box below		<b>CONSULTANT:</b> Provide only checked items below in proposal	
<input type="checkbox"/> <b>TIER I</b> (\$25,000-\$99,999)	<input type="checkbox"/> <b>TIER II</b> (\$100,000-\$250,000)	<input type="checkbox"/> <b>TIER III</b> (>\$250,000)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Understanding of Service
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Innovations</i>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Organizational Chart
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Qualifications of Team
Not required as part of Official RFP	Not required as part of Official RFP	<input type="checkbox"/>	Quality Assurance/Quality Control
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Location:</b> The percentage of work performed in Michigan will be used for all selections unless the project is for on-site p=inspection or survey activities, then location should be scored using the distance from the consultant office to the on-site inspection or survey activity.
N/A	N/A	<input type="checkbox"/>	Presentation
N/A	N/A	<input type="checkbox"/>	Technical Proposal (if Presentation is required)
3 pages (MDOT Forms not counted) ( <b>No Resumes</b> )	7 pages (MDOT Forms not counted)	14 pages (MDOT forms not counted)	Total maximum pages for RFP <b>not including key personnel resumes.</b> Resumes limited to 2 pages per key staff personnel.

**PROPOSAL AND BID SHEET EMAIL ADDRESS – [mdot-rfp-response@michigan.gov](mailto:mdot-rfp-response@michigan.gov)**

### GENERAL INFORMATION

Any questions relative to the scope of services must be submitted by e-mail to the MDOT Project Manager. Questions must be received by the Project Manager at least five (5) working days prior to the due date and time specified above. All questions and answers will be placed on the MDOT website as soon as possible after receipt of the questions, and at least three (3) days prior to the RFP due date deadline. The names of vendors submitting questions will not be disclosed.

MDOT is an equal opportunity employer and MDOT DBE firms are encouraged to apply. The participating DBE firm, as currently certified by MDOT's Office of Equal Opportunity, shall be listed in the Proposal.

### MDOT FORMS REQUIRED AS PART OF PROPOSAL SUBMISSION

**5100D** – Request for Proposal Cover Sheet

**5100J** – Consultant Data and Signature Sheet (Required only for firms not currently prequalified with MDOT)

**(These forms are not included in the proposal maximum page count.)**

# REQUEST FOR PROPOSAL

The Michigan Department of Transportation (MDOT) is seeking professional services for the project contained in the attached scope of services.

If your firm is interested in providing services, please indicate your interest by submitting a Proposal, Proposal/Bid Sheet or Bid Sheet as indicated below. The documents must be submitted in accordance with the latest (Consultant/Vendor Selection Guidelines for Services Contracts” and “Guideline for Completing a Low Bid Sheet(S)\*, if a low bid is involved as part of the selection process. **Reference Guidelines are available on MDOT’s website under Doing Business > Vendor/Consultant Services >Vendor/Consultant Selections.**

**RFP SPECIFIC INFORMATION**

BUREAU OF HIGHWAYS                       BUREAU OF TRANSPORTATION PLANNING                       OTHER

THE SERVICE WAS POSTED ON THE ANTICIPATED QUARTERLY REQUESTS FOR PROPOSALS  
 NO                       YES                      DATED \_\_\_\_\_ THROUGH \_\_\_\_\_

<input type="checkbox"/> <b>Prequalified Services</b> – See page ____ of the attached Scope of Services for required Prequalification Classifications.	<input type="checkbox"/> <b>Non-Prequalified Services</b> – If selected, the vendor must make sure that current financial information, including labor rates, overhead computations, and financial statements, if overhead is not audited, is on file with MDOT’s Office of commission Audits. This information must be on file for the prime vendor and all sub vendors so that the contract will not be delayed. <b>Form 5100J is required with Proposal for firms not currently prequalified with MDOT</b>
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**Qualifications Based Selection** – Use Consultant/Vendor Selection Guidelines

**For all Qualifications Based Selections**, the section team will review the information submitted and will select the firm considered most qualified to perform the services based on the proposals. The selected vendor will be contacted to confirm capacity. Upon confirmation, that firm will be asked to prepare a priced proposal. Negotiations will be conducted with the firm selected.

**For a cost plus fixed fee contract**, the selected vendor must have a cost accounting system to support a cost plus fixed fee contract. This type of system has a job-order cost accounting system for the recording and accumulation of costs incurred under its contracts. Each project is assigned a job number so that costs may be segregated and accumulated in the vendor’s job-order accounting system.

**Qualification Review / Low Bid** – Use Consultant/Vendor Selection Guidelines. See Bid Sheet instructions for additional information.

For Qualification Review/Low Bid selections, the selection team will review the proposals submitted. The vendor that has met established qualification threshold and with the lowest bid will be selected. The selected vendor may be contacted to confirm capacity.

**Best Value** – Use Consultant/Vendor Selection Guidelines, See Bid Sheet Instructions below for additional information. The bid amount is a component of the total proposal score, not the determining factor of the selection.

**Low Bid** (no qualifications review required – no proposal required.) See Bid Sheet Instructions below for additional instructions.

**BID SHEET INSTRUCTIONS**

Bid Sheet(s) must be submitted in accordance with the “Guidelines for Completing a Low Bid Sheet(s)\* (available on MDOT’s website). Bid Sheet(s) are located at the end of the Scope of Services. Submit bid sheet(s) separate from the proposal, to the email address: [mdot-rfp-response@michigan.gov](mailto:mdot-rfp-response@michigan.gov). Failure to comply with this procedure may result in your bid being rejected from consideration.

**PARTNERSHIP CHARTER AGREEMENT**

MDOT and ACEC created a Partnership Charter Agreement which establishes guidelines to assist MDOT and Consultants in successful partnering. Both the Consultant and MDOT Project Manager are reminded to review the [ACEC-MDOT Partnership Charter Agreement](#) and are asked to follow all communications, issues resolution and other procedures and guidance’s contained therein.

**NOTIFICATION  
MANDATORY ELECTRONIC SUBMITTAL**

**Proposals submitted for this project must be submitted electronically.**

**The following are changes to the Proposal Submittal Requirements:**

- Eliminated the Following Requirements:
  - Safety Program
  - Communication Plan
  - Past Performance as *a separate section*
  - Separate section for DBE Statement of goals. Include information in Qualification of Team section
  
- Implemented the Following Changes:
  - All proposals require an Organization Chart
  - Resumes must be a maximum of two pages
  - Only Key (lead) staff resumes may be submitted
  - Tier III proposal reduced from 19 to 14 pages
  - Forms 5100D, 5100I, and 5100G combined – 5100D
  - Forms 5100B and 5100H combined – 5100B
  - RFP's will be posted on a weekly basis -- on Mondays

**The following are Requirements for Electronic Submittals:**

- Proposals must be prepared using the most current guidelines
- The proposal must be bookmarked to clearly identify the proposal sections (See Below)
- For any section not required per the RFP, the bookmark must be edited to include “N/A” after the bookmark title.  
**Example:** Understanding of Service – N/A
- Proposals must be assembled and saved as a single PDF file
- PDF file must be 5 megabytes or smaller
- PDF file must be submitted via e-mail to [MDOT-RFP-Response@michigan.gov](mailto:MDOT-RFP-Response@michigan.gov)
- MDOT's requisition number and company name must be included in the subject line of the e-mail. The PDF shall be named using the following format:
  - Requisition#XXX\_Company Name.PDF
- MDOT will not accept multiple submittals
- Proposals must be *received* by MDOT on or before the due date and time specified in each RFP

**If the submittals do not comply with the requirements, they may be determined unresponsive.**

The Consultant's will receive an e-mail reply/notification from MDOT when the proposal is received. Please retain a copy of this e-mail as proof that the proposal was received on time. **Consultants are responsible for ensuring the MDOT receives the proposal on time.**

**\*\*Contact Contract Services Division immediately at 517-373-4680 if you do not get an auto response\*\***

**Required Bookmarking Format:**

- I. Request for Proposal Cover Sheet Form 5100D
  - A. Consultant Data and Signature Sheet, Form 5100J (if applicable)
- II. Understanding of Service
  - A. Innovations
- III. Qualifications of Team
  - A. Structure of Project Team
    - 1. Role of Firms
    - 2. Role of Key Personnel
  - B. Organization Chart
  - C. Location
- IV. Quality Assurance / Quality Control Plan
- V. Resumes of Key Staff
- VI. Pricing Documents/Bid Sheet (if applicable)

**2/14/12**

**NOTIFICATION  
E-VERIFY REQUIREMENTS**

E-Verify is an Internet based system that allows an employer, using information reported on an employee's Form I-9, Employment Eligibility Verification, to determine the eligibility of that employee to work in the United States. There is no charge to employers to use E-Verify. The E-Verify system is operated by the Department of Homeland Security (DHS) in partnership with the Social Security Administration. E-Verify is available in Spanish.

The State of Michigan is requiring, under Public Act 200 of 2012, Section 381, that as a condition of each contract or subcontract for construction, maintenance, or engineering services that the pre-qualified contractor or subcontractor agree to use the E-Verify system to verify that all persons hired during the contract term by the contractor or subcontractor are legally present and authorized to work in the United States.

Information on registration for and use of the E-Verify program can be obtained via the Internet at the DHS Web site: <http://www.dhs.gov/E-Verify>.

The documentation supporting the usage of the E-Verify system must be maintained by each consultant and be made available to MDOT upon request.

It is the responsibility of the prime consultant to include the E-Verify requirement documented in this NOTIFICATION in all tiers of subcontracts.

9/13/12

**MICHIGAN DEPARTMENT OF TRANSPORTATION**  
**ATTITUDES AND PERCEPTION SURVEY**

**REQUEST FOR PROPOSAL**  
**for**  
**BEST VALUE**

**Special notes pertaining to submission of Bid Sheet and Proposal Length**

- Cost proposal should be submitted along with RFP proposal. The format of the cost proposal is indicated at the conclusion of this RFP. Questions about this process should be directed to Amy Meldrum at [MeldrumA@michigan.gov](mailto:MeldrumA@michigan.gov). This RFP waives the 19-page limitation for proposals to allow for the integration of technical information.

**I. Objective**

The Bureau of Transportation Planning at the Michigan Department of Transportation (MDOT) is soliciting proposals for a three year contract from qualified organizations, namely private consultants, universities and/or research organizations. MDOT expects this research to provide an evaluation of MDOT's customers' attitudes and perceptions as well as satisfaction toward specific programs as described in detail below and to be summarized and promptly reported electronically on a schedule listed below. Open dialog between the consultant and MDOT during the extent of this contract is imperative.

Research Objectives:

1. To continuously monitor the perception of key customer groups and business partners regarding their satisfaction with specific MDOT projects, processes and transactions.
2. To assess the opinions of the public regarding the composition, importance, and delivered quality of the MDOT's key products and services.
3. To assess whether attitudes and perceptions have changed significantly. If so, how?
4. To assess businesses that ship, carry, or transport goods in Michigan.

The Consultant will be responsible to:

1. Meet with the MDOT Project Manager to review the project's scope and work plan.
2. Identify appropriate cost effective methods and to continuously monitor customer satisfaction with a selected number of MDOT programs, projects or transactions.

The methods developed should:

- a. Ensure data is collected through a continuous or periodic basis
- b. Ensure the data collected are
  - i. statistically valid;
  - ii. have a high degree of accuracy; and
  - iii. to the degree possible are not reflective of a respondent self-selecting survey process.
- c. Provide for meaningful results on a regular, such as monthly, basis.

- d. Allow for direct access of survey results by key MDOT staff.
- e. Allow for direct access of survey results in responses to specific questions.
- f. Allow for geographic identification of responses (such as asking for zip codes of respondents).
- g. Be low cost to implement and manage.
- h. Be graphically interesting and easy for the customer to use.
- i. Be flexible and allow for frequent changes to the questions.
- j. Include an assessment of current survey methods being used by MDOT.

Prepare and submit for approval of the project team a technical memorandum that:

- a. Evaluates current MDOT efforts.
  - b. Identifies and recommends alternative or modified methods.
  - c. Includes an implementation budget for the recommended alternatives or modifications.
3. Develop a survey guide that describes in non-technical terms the underlying principles of good survey design and implementation.
- a. Guide shall include clear, simple explanations that lead the reader through methodology and logistics decisions, writing effective questions, and drawing conclusions from the results.
  - b. Guide shall identify when on-line surveys are appropriate.

Prepare and submit for approval of the project team a Survey Fundamentals Guide on designing and implementing web-based surveys

4. Conduct Attitudes and Perception survey of Michigan adults in 2013, 2014, and 2015.
- a. Design sampling plan stratified by MDOT 7 regions as shown in Appendix A.
  - b. Develop and submit for approval of the project team and MDOT director, a survey instrument that allows for comparisons to previous surveys.
  - c. Upon approval of the survey instrument, conduct telephone household survey of Michigan adults to quantitatively assess perceptions concerning the composition, importance, and delivered quality of MDOT's key products and services
  - d. Prepare and submit for approval of the project team a technical memorandum (executive briefing) that summarizes survey results, compares them to results of prior assessments, and identifies issues deserving MDOT's attention.
  - e. Prepare a final report summarizing research methodology, findings, conclusions, and recommendations, including recommended updates to the survey instrument(s) for use in future assessments.
  - f. Make an executive presentation of key findings to MDOT's Leadership Team and identify possible actions in response to the findings at the conclusion of the project.

The products of this effort include the following:

- Full documentation of final decisions for each task
- Sampling Plans Technical Memorandums
- Michigan Questionnaires and Scripts
- Marginal Results
- Book of Tables
- Executive Briefing Technical Memorandums
- Reports
- Databases of responses in SPSS
- Presentations to MDOT Leadership Team

5. Conduct a Shippers & Carriers Survey to assess customer satisfaction that targets businesses that ship or receive goods.

The products of this effort include the following:

- Full documentation of final decisions for each task
- Sampling Plans Technical Memorandums
- Michigan Questionnaires and Scripts
- Marginal Results
- Book of Tables
- Executive Briefing Technical Memorandums
- Reports
- Databases of responses in SPSS
- Presentations to MDOT Leadership Team

MDOT staff will be responsible for:

- Providing results of previous surveys.
- Providing information on MDOT's widely important goals (WIGS).
- Securing approval of survey questions.
- Reviewing and commenting on technical documents provided by consultant.

It is the intention of MDOT staff to be heavily involved with this entire process working on questions under guidance of the consultant. The consultant will be required to provide explanations and answer staff questions via oral (teleconference) and written documentation. Consultant will provide documentation of all work and decisions at each step for each task as a record for current and future staff to understand the process and decision making that was involved to complete the final products.

## II. Background

During the development of MDOT's 2005-2030 State Long-Range Transportation Plan, Michigan residents were surveyed to gain a deeper understanding of their perceptions of transportation in the State. Three surveys were conducted and for each representative sample, 1,100 adults were surveyed about their satisfaction with the state's transportation system, their transportation priorities, and any regional differences in attitudes. The recommendations in the survey reports were contributed to the public voice for MDOT's long-range transportation planning.

In 2009, a follow-up to the Attitude and Perception (A&P) survey in 2006 was conducted. This study allowed for comparisons to the public's opinions for the three years prior. The recommendations in the 2009 report were intended to provide the public voice to help guide MDOT's transportation planning.

In 2011, the A&P survey was conducted to identify any changes in resident's perceptions or attitudes which have occurred since the completion of the previous surveys, how MDOT was doing in achieving the goals of the State Long Range Transportation Plan, *MI Transportation Plan: Moving Michigan Forward*, and whether or not the goals are still relevant.

The final reports for the 2006, 2009, and 2011 surveys can be found on the MI Transportation Plan website: [www.michigan.gov/slrp](http://www.michigan.gov/slrp). Previous surveys will be made available upon award of contract.

MDOT has long been a customer-focused organization. For many years, we have proudly declared one of our five shared values to be "customer orientation." MDOT has just updated its high-level business plan, or Strategic Plan. The new plan reflects changes in the way we do business and MDOT's role in reinventing Michigan with a renewed focus on customer-centered performance and employee engagement. We also know from recent public surveys and feedback from customers that we have many positive examples of outstanding customer service. Still, the data also reveals many areas where there is still room for improvement. As part of Governor Rick Snyder's call to reinvent Michigan and promote Good Government, he has challenged us to think and act as a customer-service industry. That means delivering great customer service to taxpayers, businesses, and visitors to Michigan. This is why the updated Strategic Plan has reformed one of our strategies to be customer-centered, emphasizing that customers are the beginning and end of everything we do.

For MDOT, one of the most strategically important things for us to do is close the gap between being a good customer-oriented organization and being an outstanding customer-service organization. To do that, our goal this year will be to make a 10 percent improvement through the use of our "Good Government in Action" process. Specifically, we aim to increase overall customer satisfaction from 73 percent to 80 percent by the end of 2013 (the 73 percent baseline comes from our 2011 Attitudes and Perceptions Survey).

The A&P survey will continue to serve as the department's benchmark. However, the department is also seeking supplemental tools to monitor customer satisfaction on a continuous basis. The department is seeking guidance on:

- How robust does the data need to be?
- What method of data collection should we be using?
- How often should we collect monitoring data? Biweekly? Monthly?
- What sub-groups of customers should we focus on?
- Is an online survey appropriate?
- Which of the key drivers should MDOT focus on?

Based on this guidance, the department is also seeking implementation of the selected methods for a 12 month period.

MDOT also wishes to review its previous A&P survey questions to determine if we need to let go of old questions and old data, and move on to measure new more relevant issues that reflect our current programs and services. MDOT has determined that the A&P survey will be done annually, in August of 2013, 2014 and 2015.

MDOT is also seeking to assess customer satisfaction that targets businesses that ship or receive goods. This assessment will be conducted twice during this contract in the summers of 2013 and 2015.

### **III. Consultant Prequalification**

This project does not require the prime consultant to be pre-qualified by MDOT.

### **IV. Project Scope**

The following is a general outline of the tasks necessary to achieve the project goals.

#### **1.0 Project Work and Management Plan**

All proposals shall include a draft project work and management plan. The plan should in detail address management of the project, each task and subtask, specific work elements, schedules, personnel assignments and hours, and quality control measures. The plan will also specifically describe how activities will be coordinated with the MDOT project manager.

In addition, the schedule included in the proposal should show how the following schedule concerns can or can not be met. The A&P surveys and results must be completed for presentation at MDOT's Leadership Team Meeting held in September of each year of this contract: 2013, 2014, and 2015.

Within five days of the contract award and the authorization to proceed, the selected consultant will meet with the MDOT project manager and other project participants to review the project work and management plan and identify any revisions and clarifications. Within five days following this initial project meeting, the consultant will complete the revisions to the work program and forward to MDOT for approval.

Over the course of the project, the consultant will provide agendas for all meetings, including teleconferences, in advance of the meeting date. Items to be reviewed at meetings will be provided to MDOT in advance as well. The consultant will produce the minutes and action items resulting from each meeting and also keep a record of significant events that may affect the outcome of the project.

MDOT will work with the consultant to schedule all meetings and review documents in a timely fashion.

**Meetings:**

- One meeting in Lansing, MI with the MDOT project manager and others
- Teleconferences as necessary

**Deliverables for Task 1.0:**

- Draft Project Work and Management Plan
- Final Project Work and Management Plan

**2.0 Methods to continuously (or periodically) monitor customer satisfaction**

Identify how MDOT might ensure that data collected through a continuous or periodic customer survey method are statistically valid, have a high degree of accuracy and are not reflective of a respondent self-selecting survey process. Identify appropriate cost effective methods and continuously monitor customer satisfaction with a selected number of MDOT programs, projects or transactions.

Develop a survey guide that describes in non-technical terms the underlying principles of good survey design and implementation.

**Meetings:**

- Teleconferences as necessary.
- On-site meetings.

**Deliverables for Task 2.0:**

- Technical Memorandum on current MDOT efforts
- Technical Memorandum that identifies and recommends alternative or modified methods
- An implementation budget for the recommended alternatives or modifications
- Survey Fundamentals Guide

**3.0 Attitudes and Perceptions Survey of Michigan Adults  
Sampling Plan and Survey Design Development**

**3.1 Sampling Plan**

The consultant will conduct a telephone survey, working from a central, monitored location, interviewing a random sample of adult Michigan residents. All previous

surveys sample size were 1,100. To obtain a sample size large enough to generalize to each of the 7 MDOT regions (appendix A), quotas for each region should be identified using the latest Census estimates of adult population in Michigan. It is expected that the actual sample size will be the same as the 2011 survey.

A dual sampling-frame was utilized in the 2011 A&P to include landline and cell phone samples, both of which were random within stratified geographies. The sampling plan shall continue this approach.

The sampling plan will be coordinated with the Community Outreach Project Manager and the MDOT Project Manager assigned to this task.

### **3.2 Survey Design**

A detailed survey methodology will be developed and documented. The survey methodology will describe, in detail, all of the steps and tasks that will be undertaken as part of the effort. In previous surveys, potential respondents were contacted through random digit dialing (RDD). In the past, the average interview was approximately 20 minutes long and up to 20 questions were asked, some with multiple components. The questions will be developed in consultation with MDOT Office of Communications, Community Outreach Project Manager, and the MDOT Project Manager prior to conducting the survey. State Transportation Director Kirk T. Steudle will approve final questions.

The survey design for MDOT's previous statewide customer satisfaction identified MDOT's key products and services and assessed perceptions of their importance and quality of delivery. The surveys raised MDOT's awareness of customers' concerns and provided valuable insights into their degree of satisfaction. Findings also influenced MDOT's strategic plans and allowed MDOT to gage progress in addressing customers' priorities.

The 2013 survey design will include a review of the previous A&P survey(s) questions to determine if we need to let go of old questions and old data, and move on to measure new more relevant issues that reflect our current programs and services. The survey design shall continue to allow for assessments and comparisons with public perceptions from these past surveys, address the following question:

- Have perceptions of MDOT's performance changed significantly? If so, how?

The survey design and sampling plan will need to ensure comparability to the previous surveys conducted for the State Long Range Transportation.

#### **Meetings:**

- Teleconferences as necessary

**Deliverables for Task 3.0:**

- Sampling Plan Technical Memorandum
- Michigan Questionnaire and Scripts
- Survey Data Collection
- Marginal Results

**4.0 Evaluate Household Survey Data**

The final report should be similar to the report created for the previous surveys and allow for overall statewide and MDOT 7 region comparisons. In addition, the report shall provide information on the research objectives:

1. To assess the opinions of the public regarding the composition, importance, and delivered quality of the MDOT's key products and services.
2. To assess whether attitudes and perceptions have changed significantly? If so, how?
3. To assess progress in addressing customer concerns through MDOT's ongoing efforts to develop and execute strategic plans.
4. To identify specific actions MDOT can take to improve its performance and the perception of customer groups and business partners regarding its performance.

The final report shall include a summarizing research methodology, findings, conclusions, and recommendations, including recommended updates to the survey instrument(s) for use in future assessments

**Meetings:**

- Teleconferences as necessary

**Deliverables for Task 4.0:**

- Book of Tables
- Final Report
- Database of responses in SPSS

**5.0 Identify Important Issues Related to Shippers and Carriers**

The consultant will interview businesses that ship or receive goods and have them rate only the attributes for each mode the business uses regularly. In completing this task, the consultant will work closely with the project manager and MDOT's freight coordination group to develop questions. The initial survey will be conducted in 2013. A follow-up survey will be conducted in 2015.

Types of questions might include:

- "Does your firm ship, carry, or transport goods or materials by truck using Michigan's highway system (Interstate, US and M routes)?"
- Overall, how would you rate Michigan's system of roads and highways for moving goods?
- Overall, how would you rate the rail freight system in Michigan for moving goods?

- Overall, how would you rate the air freight system in Michigan for moving goods?
- Overall, how well do you think Michigan's transportation system of interstates, US and M routes is meeting your company's goods movement needs?

It is expected that the survey provide near the end of the questionnaire, an open-ended question asking businesses what is the biggest freight issue or problem facing their business.

The consultant will analyze and summarize the findings of the interviews and make recommendations of future actions MDOT might take to be responsive to findings from the survey conducted under this contract. The results should address the questions:

- How might MDOT respond to issues identified and how can it ensure it makes use of the results of this survey?

A follow-up survey will be conducted in 2015 to assess changes from findings in the 2013 survey.

#### **Meetings:**

- Teleconferences as necessary

#### **Deliverables for Task 5.0:**

- Sampling Plan Technical Memorandum
- Michigan Questionnaire and Scripts
- Survey Data Collection
- Marginal Results
- Presentation to MDOT Leadership Team – September 2013 and 2015
- Executive Briefing Technical Memorandum
- Final Report
- All presentation Materials and Handouts

## **6.0 MDOT Leadership Team Presentation**

The annual Attitudes and Perception Survey and all reports are to be completed by September 30, for each year of this contract (2013, 2014, and 2015). The specific timing of the survey will be determined after contract award, however, it is anticipated that it will take place no later than August 16 of each year. The biannual Shippers and Carriers survey will be conducted in the summer of 2013 and 2015, with all reports completed by September 30 for each year. A presentation to MDOT Leadership team will be made on all surveys. **The presentation to the MDOT Leadership Team will be in September of each year.**

For this meeting the consultant will prepare an Executive Briefing Technical Memorandum summarizing research methodology, findings, conclusions, and recommendations, including recommended updates to the survey instrument(s) for use in future assessments. Among the recommendations, shall be how MDOT should make use

of the results in its decision-making and methods MDOT leadership might use over the next several years to evaluate whether MDOT has responded to the results.

**Meetings:**

- On location, Lansing, MI

**Deliverables for Task 6.0:**

- Presentation to MDOT Leadership Team – September 2013, 2014, and 2015
- Executive Briefing Technical Memorandum
- All presentation Materials and Handouts

**V. Travel**

The consultant at a minimum will be required to be on site at the MDOT Leadership Team meeting location, in Lansing, Michigan for task 6.0.

**VI. Project Schedule**

<u>Target Date</u>	<u>Required Activity</u>
April 2013	Project Begins- Anticipated
September 30, 2015	Project Complete

**NOTE:** MDOT’s new fiscal year (FY) begins on October 1 of each year. Funding for this contract is for the FYs ending September 30, 2013, 2014, and 2015. If a time only extension is required due to MDOT Leadership Team availability, pending notification of funding for FY 2015, it may be necessary to temporarily suspend work on the last day of the fiscal year (September 30). Work would resume when funding is in place. Specific language referring to State Planning and Research (SPR) funds will be in the contract.

**VII. Payment Schedule**

Compensation for this project shall be on a **milestone** basis. Compensation shall be divided into payments for the completion of the services (deliverables) by task. An example of a task milestone would be:

<b>Conference Call (Discussion with MDOT Staff)</b>	<b>10%</b>
<b>Draft Technical Paper</b>	<b>20%</b>
<b>Review of Data from MDOT Staff</b>	<b>20%</b>
<b>Finalized Technical Paper &amp; QA/QC</b>	<b>35%</b>
<b><u>Final Acceptance of Completed Task</u></b>	<b><u>15%</u></b>
<b>Total Service</b>	<b>100%</b>

Milestones will be determined in Task 1.0. The MDOT Project Manager may authorize payment if a milestone is delayed due to circumstances beyond the consultant’s control.

All billings for services must be directed to the MDOT Project Manager. Please note: Labor supporting documentation must be submitted with your billing for all labor performed on a milestone basis project.

The actual milestone payment schedule will be determined after the consultant selection has been made and will be included in the contract with the selected consultant. The selected consultant is to provide to MDOT a detailed cost breakdown for each task including labor, overhead, direct expenses, and fixed fees, which will be utilized to develop the payment schedule.

Payment to the consultant for services rendered shall not exceed the maximum contract amount unless an increase is approved in accordance with the contract.

### **VIII. Deliverables**

Progress reports and deliverables shall be submitted to the MDOT Project Manager in Microsoft Word format (compatible with 2010 version) for ease of distribution, review and comment by the MDOT project team. All Final reports will be provided in both Microsoft Word format and Adobe pdf format. Progress reports and deliverables shall be submitted by **12:00 P.M. EST** of the agreed upon due date to:

Susan A. Gorski, Manager  
Michigan Department of Transportation  
Van Wagoner Building, Mail Code: B340  
425 W. Ottawa Street  
P.O. Box 30050  
Lansing, MI 48909  
[gorskis@michigan.gov](mailto:gorskis@michigan.gov)  
(517) 335-2958

### **IX. Subcontracting of Contract Work**

A maximum of 40% of all contracted work can be conducted by a sub-consultant.

### **X. Changes in Staff**

Changes in staff that may occur during the course of the project must be approved by MDOT's Project Manager.

## **XI. Responsibilities**

The roles and responsibilities of the consultant and MDOT staff will be solidified when the final workplan is developed.

1. The MDOT Project Manager shall be the official MDOT contact person for the consultant. The consultant must address or send a copy of all correspondence to the MDOT Project Manager. This includes all sub-consultant correspondence. The MDOT Project Manager shall be aware of all communications regarding the project.
2. The consultant shall notify MDOT and obtain MDOT Project Manager's approval of all proposed sub-consultants for all work that will not be performed directly by the consultant.
3. As work progresses, the consultant will present all deliverables for review by MDOT staff. Consultant will address MDOT staff comments in a document.
4. Deliverables will be considered complete and acceptable when the MDOT Project Manager has given final approval in writing.

## **XII. Content of Proposal**

Do not simply reiterate the RFP Scope of Services in the submitted proposal. Proposals should include the following, not necessarily in the order presented:

- Scope of work, proposed approach, and workplan including timeline.
- Team Qualifications: Proposals should list all staff, their role in the project, their hours for each task, work location, and a resume of each team member that will be part of this contract team.
- Past experiences as it relates to scope of work. The consultant should include only the experience of personnel assigned to this project and clearly state their role(s) in project.
- Three References of the consultant, including contact person and phone number.
- Price Proposal for each task and summary.
- A plan and/or checklist to ensure quality control and quality assurance for the project in documentation review and estimation development.
- An example of a complete technical document composed by the primary team member(s) that will be responsible for writing the documentation for this project. The technical document can be a survey design, survey data analysis, manuals, or a similar project. Please do not submit policy documents or long-range transportation plans. **Consultant may submit one stand alone copy of the document if it is more than 10 pages long rather than attached to each copy of the proposal.**

### **XIII. Scoring Criteria**

The proposals will be evaluated based on the following scoring criteria to determine a short list of consultants who will be asked to interview. The top scoring consultants will be invited to proceed to the interview/presentation process.

1. **Understanding of Services: 45 Points.**

The proposal will be evaluated on the level of understanding of the scope of services as presented in this RFP. The consultant will also be evaluated on their unique approach to achieving the goals of the project, the comprehensiveness and cohesiveness of the proposed approach, and the techniques to be used within the framework of best practices in travel demand modeling. Evaluation will also be on the allocation of time and staff hours on specific tasks.

2. **Qualifications of Team: 30 Points.**

The professional personnel will be evaluated on the ability to meet the terms of the RFP relative to having the qualifications needed to successfully complete the project. The score will be based on education and overall experience of the individual professional personnel assigned to the project, including sub-consultants as specified in the proposal and stated in their attached resumes. The professional personnel who work on the project must be the same individuals identified in the proposal.

3. **Relevant Past Performance: 25 Points.**

The proposals will be evaluated on specific prior experience and work applicable to this scope of services. The consultant should include only the experience of personnel assigned to this project and their roles clearly stated. This also includes the prospective consultant's experience working in a cooperative team environment with other consultants and public agencies. References of consultant and sub-consultants will be checked.

This project requires a large amount of documentation and a writing sample is required. The writing sample will be evaluated for clarity and writing style. This must be a technical document written by the primary team member(s) that will be responsible for writing the documentation in this project. The technical document can be a survey development technical manual, survey data analysis, manuals, or a similar project. Please do not submit any policy documents such as Long Range Transportation Plans.

4. **Quality Assurance/Control: 10 Points.**

The proposal will be evaluated on a plan or checklist to ensure quality control and assurance for the project's documentation review, data development, and modeling. This includes methods to ensure quality in data analysis, data checks, and document version control.

5. **Location: 5 Points.**

The consultant selection criteria will include a consideration of the amount of work that will be performed in Michigan, following the MDOT standard listed here:

<u>Percentage of Work to be done in Michigan</u>	<u>Score</u>
95% to 100%	5
80% to 94%	4
50% to 79%	3
25% to 49%	2
10% to 24%	1
Less than 10%	0

6. **Price: 40 Points.**

Cost score is based on the lowest cost proposed divided by the current proposer cost multiplied by 40. Lowest bid shall receive 40 points.

**Total Points: 155 Points.**

## **XIV. Presentation/Interview**

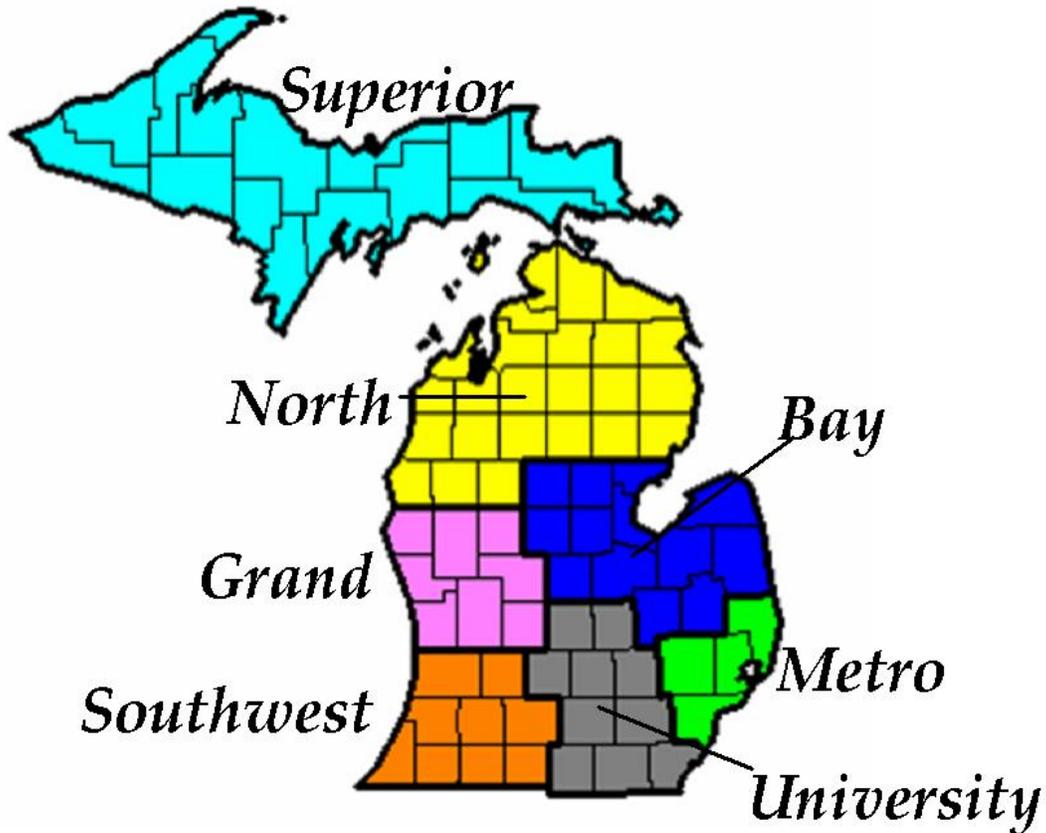
The top scoring consultants may be invited to an interview and to provide a presentation to the MDOT selection team. It may be determined that an interview and presentation are not necessary after a complete review of the proposals submitted, and at the discretion of the MDOT Project Manager.

The interview and presentation will provide an opportunity for the consultant to discuss in more detail their qualifications, past experience, and proposed work plan. The presentation/interview will consist of a maximum thirty (30) minute presentation followed by forty (40) minutes of questions/answers, and discussion. Audiovisual aids may be used during the interviews, but the consultant is responsible for all materials and equipment. The presentation must be given by the project manager listed in the proposal or the main technical staff listed in the proposal. Both project manager and main technical staff need to be present at the interview for question/answers and discussion.

Scores from the presentation/interview (**up to 20 points**) will be added to the previous proposal scores. The consultant receiving the highest combined score of the proposal and presentation/interview will be awarded the contract.

**It is anticipated that presentations/interviews will be held between TBD pending department approval of the consultants to be invited. Consultants approved for a presentation/interview will be notified directly by the project manager to finalize the date and time.**

**Appendix A: Attitudes and Perception  
Michigan Household Survey Sample Area**



**Table 1. Sample and Population Breakdown by Region from 2009 Survey**

<b>Regions</b>	<b>Proportion of Adult Population</b>	<b>Actual Sample Size</b>	<b>Proportion of Sample</b>	<b>Weighted Sample Size</b>	<b>Proportion of Weighted Sample</b>
Metro	40%	300	26%	445	40%
University	16%	150	14%	171	16%
Southwest	10%	150	14%	105	10%
Bay	12%	150	14%	137	12%
Grand	13%	150	14%	139	13%
North	6%	100	9%	66	6%
Superior	3%	100	9%	37	3%



**DERIVATION OF COST PROPOSAL**  
**Attitudes and Perception Survey**  
**Task 2**

CONSULTANT NAME  
 FEDERAL ID #

**DIRECT LABOR:**

Individual Employee <u>Classification</u>	Person <u>Hours</u>	x	Hourly <u>Rate</u>	=	Labor <u>Costs</u>
--	------------------------	---	-----------------------	---	-----------------------

Total Hours \_\_\_\_\_ Total Labor \$ \_\_\_\_\_

**TOTAL OTHER COSTS:** \$ \_\_\_\_\_

(include overhead, direct expenses, and fixed fee .

A breakdown of individual costs for these categories is not necessary at this time)

**SUBCONSULTANT FEES** Total Subconsultant Cost \$ \_\_\_\_\_

**TOTAL PROPOSED TASK 2 COSTS** \$ \_\_\_\_\_

**DERIVATION OF COST PROPOSAL**  
**Attitudes and Perception Survey**  
**Task 3**

CONSULTANT NAME  
 FEDERAL ID #

**DIRECT LABOR:**

Individual Employee <u>Classification</u>	Person <u>Hours</u>	x	Hourly <u>Rate</u>	=	Labor <u>Costs</u>
--	------------------------	---	-----------------------	---	-----------------------

Total Hours \_\_\_\_\_ Total Labor \$ \_\_\_\_\_

**TOTAL OTHER COSTS:** \$ \_\_\_\_\_

(include overhead, direct expenses, and fixed fee .

A breakdown of individual costs for these categories is not necessary at this time)

**SUBCONSULTANT FEES** Total Subconsultant Cost \$ \_\_\_\_\_

**TOTAL PROPOSED TASK 3 COSTS** \$ \_\_\_\_\_

**DERIVATION OF COST PROPOSAL**  
**Attitudes and Perception Survey**  
**Task 4**

CONSULTANT NAME  
 FEDERAL ID #

**DIRECT LABOR:**

Individual Employee <u>Classification</u>	Person <u>Hours</u>	x	Hourly <u>Rate</u>	=	Labor <u>Costs</u>
--	------------------------	---	-----------------------	---	-----------------------

Total Hours \_\_\_\_\_ Total Labor \$ \_\_\_\_\_

**TOTAL OTHER COSTS:** \$ \_\_\_\_\_

(include overhead, direct expenses, and fixed fee .

A breakdown of individual costs for these categories is not necessary at this time)

**SUBCONSULTANT FEES** Total Subconsultant Cost \$ \_\_\_\_\_

**TOTAL PROPOSED TASK 4 COSTS** \$ \_\_\_\_\_

**DERIVATION OF COST PROPOSAL**  
**Attitudes and Perception Survey**  
**Task 5**

CONSULTANT NAME  
 FEDERAL ID #

**DIRECT LABOR:**

Individual Employee <u>Classification</u>	Person <u>Hours</u>	x	Hourly <u>Rate</u>	=	Labor <u>Costs</u>
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Total Hours \_\_\_\_\_ Total Labor \$ \_\_\_\_\_

**TOTAL OTHER COSTS:** \$ \_\_\_\_\_

(include overhead, direct expenses, and fixed fee .

A breakdown of individual costs for these categories is not necessary at this time)

**SUBCONSULTANT FEES** Total Subconsultant Cost \$ \_\_\_\_\_

**TOTAL PROPOSED TASK 5 COSTS** \$ \_\_\_\_\_

**DERIVATION OF COST PROPOSAL**  
**Attitudes and Perception Survey**  
**Task 6**

CONSULTANT NAME  
 FEDERAL ID #

**DIRECT LABOR:**

Individual Employee <u>Classification</u>	Person <u>Hours</u>	x	Hourly <u>Rate</u>	=	Labor <u>Costs</u>
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Total Hours \_\_\_\_\_ Total Labor \$ \_\_\_\_\_

**TOTAL OTHER COSTS:** \$ \_\_\_\_\_

(include overhead, direct expenses, and fixed fee .

A breakdown of individual costs for these categories is not necessary at this time)

**SUBCONSULTANT FEES** Total Subconsultant Cost \$ \_\_\_\_\_

**TOTAL PROPOSED TASK 6 COSTS** \$ \_\_\_\_\_

**DERIVATION OF COST PROPOSAL  
SUMMARY  
Attitudes and Perception Survey  
Task 1 - 6**

CONSULTANT NAME  
FEDERAL ID #

**TASK 1 TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

**TASK 2 TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

**TASK 3 TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

**TASK 4 TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

**TASK 5 TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

**TASK 5 TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

**GRAND TOTAL PROPOSED COSTS** \$ \_\_\_\_\_

(This amount will be used to score price)