

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

	REQUISITION NUMBER	DUE DATE
MDOT PROJECT MANAGER	JOB NUMBER (JN)	CONTROL SECTION (CS)

DESCRIPTION

MDOT PROJECT MANAGER: Check all items to be included in RFP			CONSULTANT: Provide only checked items below in proposal
WHITE = REQUIRED GRAY SHADING = OPTIONAL			
Check the appropriate Tier in the box below			
<input type="checkbox"/> TIER I (\$25,000-\$99,999)	<input type="checkbox"/> TIER II (\$100,000-\$250,000)	<input type="checkbox"/> TIER III (>\$250,000)	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Understanding of Service
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<i>Innovations</i>
N/A	<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 \_\_\_\_\_

**Prequalified Services** – See page \_\_\_\_ of the attached Scope of Services for required Prequalification Classifications.

**Non-Prequalified Services** – 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. **Form 5100J is required with Proposal for firms not currently prequalified with MDOT**

**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.

**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.**

**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**

**Michigan Department of Transportation**

**SCOPE OF SERVICE  
FOR  
SPECIALTY SERVICES**

Providing For the Safe Routes to School Program (SRTS – 2012 to 2015/2018)

**Revised 3/20/2012**

**CONTROL SECTION(S)**: 84900 Statewide

**JOB NUMBER(S)**: 116005

**PROJECT LOCATION**: Statewide

**DESCRIPTION OF WORK:**

Services will provide for continued program development, project management, education/outreach, and technical assistance to schools, communities, and partner agencies for the federal Safe Routes to School (SRTS) Program.

**ANTICIPATED START DATE:** October 2012

**ANTICIPATED COMPLETION DATE:** September 2015

This contract will be issued for a three-year period, as noted by the above dates, with options for up to three, one-year extensions. All work and funding subject to Congressional action with regards to program authorization, and to FHWA regulations and guidance.

**DBE PARTICIPATION:** N/A

**MDOT PROJECT MANAGER:**

Bryan Armstrong, AICP  
Safe Routes To School Program Coordinator  
Office of Economic Development  
Michigan Department of Transportation  
425 W. Ottawa Street  
P.O. Box 30050  
Lansing, MI 48909  
517-335-2636 Phone  
517-373-2687 Fax  
E-mail: [armstrongb@michigan.gov](mailto:armstrongb@michigan.gov)  
Website: [www.saferoutesmichigan.org](http://www.saferoutesmichigan.org)

Work will be performed under the direction and supervision of the MDOT Project Manager (PM). The Consultant will perform the Services and provide to MDOT the deliverables as outlined in this Scope of Services.

### **PROGRAM DESCRIPTION:**

Safe Routes to School is a worldwide movement—and now a federal program—to make it safe, convenient and fun for children to bicycle and walk to school. When routes are safe, walking or biking to and from school are easy ways for children to get the regular physical activity they need for good health. Safe Routes to School initiatives also help ease traffic jams, reduce air pollution, unite neighborhoods, and contribute to students' readiness to learn in school.

The federal Safe Routes to School program was enacted in August 2005. As a result, every state now has dedicated dollars to help communities implement infrastructure improvements and noninfrastructure activities to encourage and enable students to walk or bike to school.

Michigan's Safe Routes to School (SR2S) program is administered by the Office of Economic Development (OED) of the Michigan Department of Transportation (MDOT) with administrative, training and logistical support from the selected Consultant. The selected Consultant also serves as the grant administrator for all Safe Routes to School noninfrastructure grants.

### **PROGRAM PURPOSES AND ELIGIBLE ACTIVITIES**

The federal legislation specifies the following purposes for the program:

- To enable and encourage children in grades K-8, including those with disabilities, to walk and bike to school.
- To make bicycling and walking to school a safer and more appealing alternative, thereby encouraging a healthy and active lifestyle from an early age.
- To facilitate the planning, development and implementation of projects and activities that will improve safety and reduce traffic, fuel consumption, and air pollution in the vicinity of schools.

These funds can support both infrastructure and noninfrastructure projects. The statute identifies project types for each category as follows:

#### **Infrastructure Projects**

- Sidewalks
- Traffic calming and speed reduction
- Pedestrian and bicycle crossing improvements
- On-street and off-street bicycle facilities
- Off-street pedestrian facilities
- Traffic diversion improvements in the vicinity of schools

### Noninfrastructure Projects

- Activities to encourage walking and bicycling to school
- Public awareness campaign, community outreach
- Traffic enforcement operations in the vicinity of schools
- Traffic education
- Student training sessions (bicycle and pedestrian safety)
- Funding for training volunteers and managers of Safe Routes to School programs

Infrastructure projects must be within a two-mile radius of the school and must be implemented by a city, village or county road commission. Noninfrastructure projects may be implemented by schools, local agencies or nonprofit organizations.

### SR2S PLANNING PROCESS

As a prerequisite for funding eligibility, schools must complete a school-based planning process culminating in the creation of a comprehensive SR2S Action Plan. This process is described and facilitated in Michigan's SR2S Handbook. Schools that are interested in applying for federal Safe Routes to School funding are expected to:

1. Register their school with the Selected Consultant.
2. Designate a SR2S coordinator. The coordinator is encouraged to participate in a free SR2S training session.
3. Establish a SR2S team. The members of the team will vary from school to school, but often include: a school administrator, teacher(s), student leader(s), parent(s), a local law enforcement official/officer, and a representative from the local road authority.
4. Assess attitudes and behaviors related to walking and biking to school. Schools will survey parents and students to assess their behavior, beliefs and attitudes regarding walking and biking to school.
5. Assess the safety of walking and/or biking routes. School teams will conduct walking/bicycling audits to assess the physical environment around the school and along routes traveled by students in order to identify barriers to safe walking and biking.
6. Develop a SR2S Action Plan. The SR2S team will review findings from the walking/bicycling audit and information collected through student and parent surveys to develop recommendations to encourage and enable students to walk to school on safe routes. The Action Plan will address education, encouragement, enforcement and/or engineering needs.

### TECHNICAL ASSISTANCE AND OTHER SUPPORT

All schools registered in Michigan's SR2S program will receive the following at no charge from the Selected Consultant and its network partners:

- A SR2S Handbook. The SR2S Handbook is a user-friendly guide for starting and maintaining a SR2S program. The Handbook contains many time-saving extras, including templates for creating flyers, invitations, press releases and more. The

Handbook also includes a 14-minute DVD overview of the SR2S pilot program.

For more information, see the SR2S web site <http://saferoutesmichigan.org/handbook>

- Training. SR2S team leaders, principals, local officials and other stakeholders are encouraged to participate in SR2S trainings. Training sessions are offered periodically throughout the year to help school teams develop effective, sustainable programs. Some training is also available via pre-recorded webinars.
  - Walk to School Day Kits. Schools that register for Walk to School Day—a one day event— will receive an event-planning guide, brochures for every child/family, stickers for all walkers, a certificate from the Governor, and more.
  - Assistance with survey data analysis. Currently a Michigan university is leading the evaluation component of Michigan’s SR2S program and assisting schools with data collection, analysis and reporting.
  - Ongoing technical assistance. Telephone and e-mail assistance is available from the Selected Consultant.
  - Michigan’s Make Trax curriculum. Make Trax enables students, typically middle school students, to conduct the field work and analysis necessary to create a SR2S Action Plan and present the results to local leadership boards and councils.
- For more information, see the SR2S web site <http://saferoutesmichigan.org/maketrax>

#### MICHIGAN PROGRAM HIGHLIGHTS 2005-2011

- In 2003, with support from Michigan’s Governor Jennifer M. Granholm, leaders from the departments of Transportation, Community Health, and Education joined together with universities, non-profits, and other individuals to work with 11 schools to develop and provide resources for the state’s SR2S pilot program. One outcome of the two-year pilot program was the 2005 publication of the Michigan SR2S Handbook and the launch of Michigan’s statewide program.
- In 2007, The Michigan Department of Transportation received the first James L. Oberstar Award from The National Center for Safe Routes to School for the exemplary establishment of Michigan’s Safe Routes to School Program.
- Over 480 schools in 73 counties have registered for the SR2S program, including public schools, charter schools, and private schools. The total enrollment for these schools exceeds 200,000 students.
- Over 235 schools registered for Walk to School Day in 2011. Walk to School Day is a one-day event that often serves as a kick-off for SR2S programs.
- To date, 128 Michigan schools have been awarded federal Safe Routes to School funds totaling \$20.5 million to implement safety improvements and education programs aimed at encouraging healthy lifestyles and improving opportunities for students to walk and bike safely between home and school.
- The SR2S State Network was established to achieve permanent and sustainable outcomes for as many Michigan schools as possible through the institutionalization of SR2S in the mission, policies, programs and practices of its network organizations.
- In 2010, the SR2S program released a white paper, Effectively Planning and Implementing Safe Routes to School for Students with Disabilities, and awarded

grants to three schools to develop model programs that address the challenges children with disabilities may face while participating in SR2S programs.

- In 2011, the SR2S program awarded mini-grants of up to \$5,000 to 14 schools to pilot walking school bus programs.

### **GENERAL INFORMATION:**

The Consultant shall be an employee of the primary consulting firm responding to the RFP and not a subconsultant. The Consultant should be prepared to demonstrate the firm's background and experience. This will be a major part of the selection process for this RFP.

The Consultant shall have relevant experience working with federal and/or State of Michigan transportation funding. Preferably, that experience includes interaction with MDOT'S Region and Transportation Service Center staff, and with Local Agency Program staff. **Should the Consultant have experience working with SRTS projects, Consultant should provide relevant references and examples of local, state, and/or national level SRTS product, and explain the relevance of that experience to delivery of the SRTS program in Michigan.**

The Consultant shall have relevant experience consulting and/or contracting with not-for-profit sector and state and local public sector organizations, including contracts involving federal transportation funding. The Consultant shall have experience developing and managing collaborative projects involving multiple and diverse groups of individuals and organizations.

**The Consultant shall demonstrate working knowledge of the Safe Routes to School program as authorized by Congress in SAFETEA-LU, and subsequent actions. The Consultant should identify important, SRTS relevant, local, state, and national partnerships across multiple disciplines, diverse stakeholder groups and communities, and describe the steps necessary to develop and sustain those relationships.**

The Consultant shall have relevant experience consulting and/or contracting on projects involving research, training, education, policy, and program development and implementation; including projects involving measurement and evaluation of attitudes, beliefs, and behaviors, and development of strategies, policies, and programs for producing change in attitudes, beliefs, and behaviors. The Consultant should explain the relevance of that experience to delivery of the SRTS program in Michigan.

The Consultant should have experience working with, or conducting, community assessment, visioning and/or comprehensive planning, process improvement, and community development, projects; preferably projects with a focus, or emphasis, on non-motorized modes of transportation, including accommodations for differently-abled individuals. The Consultant should have knowledge of the relationships or interactions between neighborhood, community, regional, and statewide plans, including the role of Metropolitan/Regional Planning Organizations and state agency oversight and/or

involvement. The Consultant should explain the relevance of that experience to delivery of the SRTS program in Michigan.

The Consultant shall demonstrate knowledge of street-scale urban design principles, practices, and policies, walking and bicycling audits, road diets, traffic calming and integration of non-motorized transportation with the built environment; and how these principles, policies, practices, and techniques, relate to or can be integrated with community development/re-development plans, principles, and practices variously described with terms such as Active Living Communities, Complete Streets, Context Sensitive Solutions, Livable Communities, Place Making, Sustainable Communities, and/or Walkable Communities. The Consultant should explain the relevance of that knowledge to delivery of the SRTS program in Michigan.

The Consultant shall demonstrate on-going relationships with multiple and diverse groups and organizations, to include: not-for-profit, governmental, university, primary education, state and/or federal government, advocacy, professional, and for profit organizations. The Consultant should discuss the potential those relationships have for delivery of the SRTS program in Michigan.

The Consultant shall furnish all services and labor necessary to conduct and complete the services described herein. The Consultant shall also furnish all materials, equipment, supplies, and incidentals necessary to perform the Service (other than those designated in writing to be furnished by MDOT), and check and/or test the materials, equipment, supplies, and incidentals as necessary in carrying out this work. The Services shall be performed to the satisfaction of MDOT, consistent with applicable professional standards.

The Services describe herein are financed with public funds. The Consultant shall comply with all applicable Federal and State laws, rules, and regulations. The Consultant shall perform field activities as needed in accordance with MIOSHA regulation and accepted safety practices. The consultant staff shall conduct themselves with professionalism in carrying out their duties.

The Consultant will notify the PM, in writing, prior to any personnel changes from those specified in the Consultant's original approved proposal. Any personnel substitutions are subject to review and approval by the PM.

At the request of MDOT, the Consultant, during the progress of the Services, shall furnish information or data relating to the Services described herein that may be required by MDOT to enable it to carry out or to proceed with related phases of the Project not described herein, or which may be necessary to enable MDOT to furnish information to the Consultant upon which to proceed with further Services.

All materials submitted in response to this RFP become the property of MDOT, proposals and supporting materials will not be returned to the consultants. MDOT reserves the right to reject any or all proposals.

## **DEFINITIONS:**

SR2S – acronym used here for Michigan’s Safe Routes to School Action Planning process, as defined in Michigan’s SR2S Handbook.

SRTS – acronym used for the federal Safe Routes to School program as defined by Congress and for reference to federal grant application, award and project implementation processes.

STATE NETWORK – currently includes MDOT, Consultant, and various state, university and non-profit agencies, typically involved by way of subcontract with Consultant. State Network membership can, and has, vary over time, due to changes in annual work program or MDOT, region or statewide initiatives as defined by PM or State of Michigan leadership.

COALITION – includes State Network entities, registered schools, and other individuals and agencies that have actively engaged Michigan’s SR2S program.

## **CONFLICT OF INTEREST AND OTHER CONDITIONS OF THE CONSULTANT CONTRACT:**

The Consultant agrees that it and its affiliates will not have and will not acquire, either directly or indirectly, any public or private interest in connection with this project that would conflict or appear to conflict in any manner with the performance of the services under this contract. “Affiliate” means a corporate entity linked to the consultant through common ownership. The Consultant agrees that it and its affiliates will not provide any services to a contractor or any entity that may have an adversarial interest in a project for which it has provided services to MDOT. In all situations, MDOT will determine if a conflict of interest exists. If MDOT determines that a conflict of interest exists; it will inform the consultant (and its affiliates). If the consultant and its affiliates choose to retain the interest constituting the conflict, MDOT may terminate the contract for cause.

## **CONSULTANT RESPONSIBILITIES:**

The Consultant shall provide all necessary project management services, including progress reports, developing and maintaining a project schedule, and providing invoices in a timely manner.

The following is a list of Consultant responsibilities (goals) for the current fiscal year, 2012. Responsibilities may change and will be re-negotiated with the PM annually.

- A. Provide outreach, training, and technical assistance to inform, register, and assist Michigan elementary and middle schools to sustain Safe Routes to School (SRTS).
- B. Assist MDOT with grant application and selection process.
- C. Document program evaluation design, methodology and tools; conduct evaluation; and report outcomes.
- D. Administer noninfrastructure subcontracts for schools/communities receiving SRTS funds.
- E. Administer, coordinate, and provide oversight of noninfrastructure subcontracts for state agency, university and non-profit partners receiving SRTS funds, to include coordination across projects to avoid duplicity and encourage synergy.

- F. Define, and implement portions of, a broad communication and education strategy to advance Safe Routes to School in Michigan.
- G. Collaborate, support and provide oversight for MPO's and other public agencies, as defined by PM, for regional approaches to program delivery. May include initiation pilot and/or one-time effort with an MPO, as directed by PM, to determine effectiveness of blanket approach involving all schools in targeted region, regardless of school commitment and participation. Consultant would not issue subcontract with MPO, but would have oversight responsibilities, engage with actively participating schools through technical assistance duties and recommend approval of MPO work to PM.

### **DELIVERABLES:**

The Consultant will provide, but not limited to, the following deliverables in association with the goals and objectives listed under Consultant Responsibilities. The deliverables may change as responsibilities are re-negotiated annually.

SRTS program parameters and funding are subject to Congressional action and Federal Highway Administration regulations and guidance. There is currently a need for program re-authorization. All future program operations and funding may cease and/or vary significantly from the program currently authorized by Congress and administered by the FHWA.

Goal A: Provide outreach, training, and technical assistance to inform, register, and assist Michigan elementary and middle schools to sustain Safe Routes to School. The Consultant will use the grant coordinator model for providing customer services. Each of MDOT's seven Regions will have grant coordinator assigned as primary contact for program inquiries and customer service. This relationship based distribution of work load across program staff is also used in Michigan's Transportation Enhancement and Transportation Economic Development Fund programs. See current SR2S grant coordinator region assignments at <http://saferoutesmichigan.org/contact>  
See current TE and EDF grant coordinator region assignments at [http://www.michigan.gov/documents/mdot/MDOT Economic Development Fund Contact\\_263523\\_7.pdf](http://www.michigan.gov/documents/mdot/MDOT_Economic_Development_Fund_Contact_263523_7.pdf)

- 1) Michigan SR2S program Website maintenance and reorganization. <http://saferoutesmichigan.org/>
- 2) Monthly broadcast email tied to website content.
- 3) 18 local, state, and national presentations, including national Safe Routes to School Conference presentations every other year – 2013, 2015.
- 4) School registration, progress tracking, and database development/maintenance (NOTE that data currently maintained using spreadsheets, pending MDOT development of SRTS program database/application software in 2013/2014.).

- 5) Support for schools participating in 2012 Walk to School Day, October 3, 2012. International Walk to School Day is the first Wednesday in October.
- 6) 2013 Walk to School Day planning.
- 7) 2013 Bicycle to School Day planning and support for participating schools. SRTS Bicycle to School Day will kick off in spring 2012 and is expected to become an activity supported by the SRTS National Center in the future.
- 8) State Coalition annual meeting and database (currently maintained using spreadsheet) management.
- 9) Four regional trainings, to include action plan decision-making, Make Trax procedures, education and encouragement best practices, and other content identified as needed.
- 10) Regular conference call training (or other virtual training, e.g., webinars) to include SR2S Handbook planning process, Make Trax overview, and other basic content identified as needed.
- 11) SR2S handbook distribution and database.
- 12) Telephone and e-mail technical assistance.
- 13) Off-site technical assistance as requested.
- 14) Safe Routes to School National Partnership collaboration and/or participation.
- 15) Vendor contracts.

Goal B: Assist MDOT with SRTS funding award application and selection process.

- 1) Continue 2012 pilot program, as annual mini-grant program, for approximately 12 to 15 non-infrastructure grants provided on a) walking school buses/bike trains and b) mileage clubs. To the degree possible seek opportunities to issue mini grants in each of 7 MDOT regions, each year.
- 2) Review of school/community applications for funding awards and provision of feedback for improvement as necessary.
- 3) End-user (applicant) technical assistance via telephone or e-mail.
- 4) Application “database” management. Note that pending MDOT development of SRTS program database, with on-line application functionality, applications are currently received in hard copy format, and record keeping is primarily by use of spreadsheets.
- 5) Application document and guidance review and revisions as needed.
- 6) Consultation and materials to assist MDOT/MDTMB with application system database development.

Goal C: Document program evaluation design, methodology and tools; conduct evaluation; and report outcomes.

- 1) Manage content of, and provide technical support for users of, surveys and evaluation instruments for students, parents and classroom observations revised in English, Spanish and Arabic; in paper and web formats; and for disabled populations. These instruments currently exist.
- 2) Prepare reports for schools who submit baseline/pre-test and/or post-test data from observations, student and parent questionnaires.

- 3) Prepare final evaluation reports for schools which have pre and post-test data from observations, student and parent questionnaires. These are schools which have been funded for infrastructure and/or noninfrastructure investments and the contract is closed.
- 4) Maintain protocol, and responsibility, for uploading data into federal database (parent and observation data).
- 5) Provide status reports to the PM as needed.
- 6) Prepare summary or compilation reporting for MDOT in report format, conference presentations, and scholarly and practitioner outlets.  
Provide technical assistance to Consultant or State Network team working on schools (12 to 15 per year) that receive mini-grants to initiate and strengthen walking school bus implementation and mileage program implementation.
- 7) Provide technical assistance to those MDOT, schools and community groups working on transportation initiatives to include students with disabilities in SRTS planning.

Goal D: Administer, coordinate, and provide oversight of noninfrastructure subcontracts for schools/communities receiving SRTS funds.

- 1) Execute contracts with schools, or their nonprofit fiduciary, upon issuance of grants for noninfrastructure projects.
- 2) Noninfrastructure grant invoice and progress report oversight and submission to MDOT.
- 3) Provide technical assistance and training, as needed, to noninfrastructure grant recipients.

Goal E: Administer, coordinate, and provide oversight of noninfrastructure subcontracts for State Network Partners (currently consisting of state agency, university and non-profit entities) receiving SRTS funds, to include coordination across projects to avoid duplicity and encourage synergy. As Network Partners are engaged to accomplish some of the deliverables in association with the goals and objectives listed under Consultant Responsibilities, and since the deliverables may change as responsibilities are re-negotiated annually, the need for, and duties assigned to, Network Partners may change accordingly.

- 1) Invoice and progress report oversight and submission to MDOT.
- 2) Technical assistance and training.
- 3) Quarterly meetings and ongoing communication.
- 4) State Network Partnership assessment and strategy.
- 5) Action planning funding partnership development and assistance. This could be either collaboration with another funding source (for mini-grants) or coordination across sub-consultants and schools to maximize efficient use of program funds.

Goal F: Define and implement to degree possible a broad communication and education strategy and timeline to advance Safe Routes to School in Michigan. To degree possible we will target parents, the SRTS state coalition and other stakeholders in

the 7 MDOT regions and will utilize social networking, the website, print and electronic media. Deliverables targeted for distribution are:

- 1) Marketing kit for associations and agencies (i.e., membership organizations).
- 2) Resource library of 1-page promotional materials for schools to engage parents.
- 3) Success stories.

### **PROJECT MANAGEMENT:**

This project will require close interaction and good communication between the consultant and MDOT. If there are any major deviations from the original scope of this assignment, these changes must be documented and jointly approved by the Consultant and MDOT.

The Consultant shall provide all necessary project management services, including progress reports, developing and maintaining a project schedule, and providing invoices in a timely manner.

The Consultant shall demonstrate relevant expertise, experience and technical ability in the following areas:

- Managing, administering consulting contracts including project management, planning and budget management,
- Quality management and other project controls, including scheduling, quality compliance, cost estimating, document control, general accounting, cost accounting and budgeting.

### **STATUS REPORTS/ MEETINGS:**

There will be periodic, regular meetings between MDOT and the selected consultant to review work product, including review of SRTS grant applications submitted by schools and their local road agency partners, and to communicate progress, real or anticipated issues, ideas, and expectations.

The Consultant shall provide copies of all project reports, correspondences, meeting announcements, and meeting minutes which shall be delivered by e-mail to the MDOT Project Manager.

### **MONTHLY PROGRESS REPORT**

On the first of each month, the Consultant Project Manager shall submit a monthly project progress report to the Project Manager.

### **PROJECT DOCUMENTATION:**

All documentation and reports shall be delivered in the Microsoft Word or Excel format. All documentation delivered shall be clear, concise, complete, and in compliance with standards required by the MDOT Project Manager.

### **MDOT RESPONSIBILITIES:**

1. Provide overall direction and set priorities
2. Provide guidance for development, and approval for implementation, of annual work program for the Consultant and each subcontractor, aligned with MDOT fiscal year
3. Work with consultant to Schedule and/or conduct the following:
  - a. Project related meetings, including grant application review meetings
  - b. Review and oversight of the consultant's plan for implementation
  - c. Promptly pay for satisfactory completion of services provided
4. Coordinate activities that require MDOT personnel
5. Assist the consultant in obtaining existing or available information necessary for the completion of the organizational assessment
6. The PM will review draft reports and provide the consultant with written comments within 30 days. The consultant will revise any draft report provided to address the PM's comments and produce.

### **CONSULTANT PAYMENT - Actual Cost:**

MDOT will issue work to the Consultant by way of a written document defining such work and the reimbursement conditions, such document to be called an authorization.

Compensation for this project shall be on an **actual cost** basis. This basis of payment typically includes an estimate of labor hours by classification or employee, hourly labor rates, applied overhead, other direct costs, and subconsultant costs. This basis of payment is typically used for non-profits or universities.

All billings for services must be directed to the Department and follow the current guidelines. The latest copy of the "Professional Engineering Service Reimbursement Guidelines for Bureau of Highways" is available on MDOT's website. This document contains instructions and forms that must be followed and used for billing. Payment may be delayed or decreased if the instructions are not followed.

Payment to the Consultant for services rendered shall not exceed the maximum amount in each authorization. Typically, billings must be submitted within 60 days after the completion of services for the current billing. The final billing must be received within 60 days of the completion of services. Refer to your contract for your specific contract terms.

Direct expenses, if applicable, will not be paid in excess of that allowed by the Department for its own employees in accordance with the State of Michigan's Standardized Travel Regulations. Supporting documentation must be submitted with the billing for all eligible expenses on the project in accordance with the Reimbursement Guidelines. The only hours

that will be considered allowable charges for this contract are those that are directly attributable to the activities of this project.

The use of overtime hours is not acceptable unless prior written approval is granted by the MDOT Region Engineer/Bureau Director and the MDOT Project Manager. Reimbursement for overtime hours that are allowed will be limited to time spent on this project in excess of forty hours per person per week. Any variations to this rule should be included in the priced proposal submitted by the Consultant and must have prior written approval by the MDOT Region Engineer/Bureau Director and the MDOT Project Manager.

---

## **PROPOSAL FORMAT AND CONTENTS**

---

The Consultant shall not contact any other employee, elected official, member, or agent of the state of Michigan concerning this request as a part of your preparation for your response to this RFP and its engagement, unless otherwise delegated by the PM.

For purposes of proposal evaluation, each proposal must be submitted in two (2) parts and will be in accordance with MDOT's Consultant/Vendor Selection Guidelines which can be found on the MDOT web page under [Vendor/Consultant Services](#).

**Part I** – Technical and Management Submittal

**Part II** – Compensation

### **PART I – TECHNICAL AND MANAGEMENT SUBMITTAL:**

#### **Background of the Organization**

Please provide an introduction to your organization, briefly summarizing its history and experience with research, planning, evaluation, education, training and evaluation projects and specific experience in transportation. Describe experience with administration of grant programs, for infrastructure and/or noninfrastructure grants, program and project development aimed at creating public awareness and changes in behavior and/or mode of travel.

#### **Understanding of Services**

Describe your understanding of the services you intend to propose. This information is to be based on the scope of services. Include any work item that you believe should be added to the scope of services, or any work item that is in the current scope of services which you believe should be altered. Describe the benefit of the services.

Please provide your organization's local availability and degree of accessibility to Lansing, Michigan. If your firm is not located in Michigan, please explain how the requisite accessibility will be provided.

#### **Team Qualifications, Experience and Performance**

Demonstrate the availability of staff and their ability to provide the full range of knowledge and experience needed to perform the work associated with this RFP. Complete and sign [Form 5100D](#) attesting to the fact that the key personnel being proposed are available and have sufficient time available to provide the service as outlined in this RFP.

Identify the members of the organization who will be assigned to this project on a priority basis. Provide resumes for each of the key staff of the prime and any subconsultants. In addition to general resume information, the following information should be provided for service experience that is similar to the service being solicited:

- a. General description of the service

- b. Role of the person in the service
- c. Service budget
- d. Year service was completed
- e. Name of client (agency or company)
- f. Role of the Consultant in the service
- g. Name and phone number of person to contact for client
- h. Please note, MDOT considers the naming of personnel as a commitment by the firm to assign these particular individuals to this project unless other personnel are requested by MDOT. If personnel changes occur within the selected firm, MDOT reserves the right to approve new personnel.

Provide a summary of projects of this type or of a similar type your organization has performed since the year 2002. Provide the name of the organization for which the work was provided as well as the project budget.

## **PART II – COMPENSATION**

Note: Required compensation information must be presented in a separate document. This will ensure that pricing of all proposals will be evaluated separately from the technical review for understanding of the assignment and experience of staff.

Complete the attached bid sheet and present in a separate document.

### **Consultant Payment Schedule**

Note: Required compensation information must be presented in a separate document. This will ensure that pricing of all proposals will be evaluated separately from the technical review for understanding of the assignment and experience of staff.

Please include a copy of your hourly rate schedule for each title/classification of employee, using the instructions and the table provided, below. These rates will be the maximum you may charge for each job title/classification, for the duration of the contract. Provide a brief description of each title/classification.

~~Other direct costs — Provide a list of all other non salary expenses for which your firm expects to be compensated. Please be advised that all direct non salary expenses will be reimbursed at cost. Travel, meals, and lodging expenses shall be limited to the prevailing maximum rates established by the Michigan Department of Management and Budget, in accordance with the cost principles established in OMB Circular A-87.~~

---

## **SELECTION PROCESS**

A selection team will select the Consultant from among the qualified candidates. The contract will be awarded to the Consultant whose proposal demonstrates the best value to MDOT, based on the technical and cost criteria listed below. Award shall be made to the

Consultant whose proposal receives the highest total score after considering all technical and pricing evaluation factors.

## **SCORING CRITERIA FOR EVALUATION OF PROPOSALS:**

Scoring and evaluation will be based on the following criteria:

### **1. Understanding of Project Need and Description of Services (15 Points)**

Describe your understanding of the project needs. Describe the services you intend to provide to meet those needs. This information is to be based on the scope of services **in this RFP, including, but not limited to, the General Information and Consultant Responsibilities sections.**

### **2. Qualifications of Team (30 Points)**

The scoring for the qualifications of the team will be one score based on the structure of the team, their qualifications and experience, and demonstrated staffing capacity of the firm to meet our needs.

#### Structure of the Project Team

Describe the structure of the project team. Include the roles of all key personnel. Describe the use of any subconsultants including the service to be provided, role, and percent of role the subconsultant is expected to provide.

#### Experience of the Project Team

Describe the quality, extent and relevance of experience of individuals assigned to the Project Team. List the Team's direct participation in other related projects.

Provide Résumés for each key staff. The format is shown in [Form 1242](#) of the Consultant/Vendor Selection Guidelines (Part 5, Section B.2) may be used for reference, which can be found on the MDOT web page under [Vendor/Consultant Services](#). Limit each résumé to three (3) pages. Include resumes of proposed team members. (Résumés are not included in the 19 page maximum). Include a copy of your organization chart.

#### Availability of the Project Team

Provide statement of the availability of key staff to provide services and mitigation strategy should key staff not be available.

### **3. Past Performance (20 Points)**

MDOT will be contacting organizations in which you have performed work of a similar nature to determine adequacy of performance. **Consideration will be given for experience with SRTS projects.** Provide references and examples of local, state, and/or federal level SRTS product.

### **4. Location (5 Points)**

Consideration will be given for the percentage of contracted work performed in Michigan. Provide the location of where the work will be performed.

**5. Price**

**(25 Points)**

The lowest bid will receive 25 points and the other bids will receive progressively lower points based on a percentage formula.  $Low\ bid/bid * 25 = score$

**6. Collaboration, Partnership Development, Organizational Relationships (5 points)**

Identify important, SRTS relevant, local, state and national partnerships across multiple disciplines, diverse stakeholder groups and communities, and describe the steps necessary to develop and sustain those relationships. Provide examples of similar work.

**OTHER REQUIRED INFORMATION**

Principal Contact. Please provide the full name, title, firm name, mailing address, telephone number, and facsimile number of the primary contact person from your organization for this request for proposal.

**GENERAL ORGANIZATION INFORMATION**

**REQUIRED RESPONDENT INFORMATION**

Please provide the following required respondent information. Failure to respond to each requirement may disqualify the respondent from further participation in this RFP.

**RESPONDENT NAME AND ADDRESS:** Provide name, address, principle place of business, telephone number of legal entity with whom the contract is to be written, and the web page address.

<b>Name and Title:</b>		
<b>Address:</b>		
<b>City, State, Zip:</b>		
<b>Phone:</b>	( )	<b>Facsimile:</b> ( )
<b>Web Page:</b>		

**LOCATION ADDRESS**

<b>Address:</b>	
-----------------	--

<b>City, State, Zip:</b>	
--------------------------	--

**ORGANIZATION AND YEAR:**

Please provide the legal status and business structure (corporation, partnership, sole proprietorship, etc.) of the respondent and the year the entity was established.

<b>Status:</b>		<b>Year:</b>
----------------	--	--------------

**RFP CONTACT:**

Please provide the following information of the respondent's RFP contact:

<b>Name and Title:</b>		
<b>Address:</b>		
<b>City, State, Zip:</b>		
<b>Phone:</b>	( )	<b>Facsimile:</b> ( )
<b>Web Page:</b>		

**HOURLY BILLING RATES PRICE SUBMISSION FORMAT**

Instructions: To fairly evaluate the proposals to determine the best price, you are asked to assign each of your team members to one of the following generic job classifications shown on the table below. Include the maximum hourly billing rate for each generic job classification. Include the names and working titles of each team member in the spaces below each classification title. Provide only one maximum hourly rate per each classification for each of the three (3) years of the agreement. If the contract term should be extended for additional years, billing rate increases will be limited to the cost of living index.

Provide the percentage of time, on annual basis; each classification may spend on average based on your firm's experience for all similar projects by your staff in the past 3 years.

**CONSULTANT BID SHEET**  
**SPECIALTY SERVICES**

**MAXIMUM HOURLY BILLING RATES PRICE SUBMISSION FORMAT**

<b>Generic Job Classification List your Firm's Employee Name and Working Title</b>	<b>%</b>	<b>Year 1 (2012-2013) Maximum Hourly Billing Rate</b>	<b>%</b>	<b>Year 2 (2013-2014) Maximum Hourly Billing Rate</b>	<b>%</b>	<b>Year 3 (2014-2015) Maximum Hourly Billing Rate</b>
Senior Consultant (list by name)						
Program Manager (list by name)						
Operations Manager/ Grant Coordinator (list by name)						
Contract Manager/Grant Coordinator (list by name)						
Training Manager/Grant Coordinator (list by name)						
Analyst/Grant Coordinator (list by name)						
Technical Support (list by name)						
Administrative Support (list by name)						
Student Assistant/Intern (list by name)						
<b>Other Direct Costs</b>		<b>Year 1—Maximum (2012-2013)</b>		<b>Year 2—Maximum (2013-2014)</b>		<b>Year 3—Maximum (2013-2014)</b>
		\$		\$		\$

<b>Consultant Name:</b>	
<b>Consultants Authorized Legal Signer:</b>	
<b>Consultant Address:</b>	
<b>Date:</b>	

**Note:** MDOT reserves the right to reject any or all bids.