

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 Service Contracts" and "Guideline for Completing a Low Bid Sheet(s)", if a low bid is involved as part of the selection process. **Referenced 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 Required with Proposal)**

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 RFP's that originate in Bureau of Transportation Planning only**, a priced proposal must be submitted at the same time as, but separate from, the proposal. Submit directly to the Contract Administrator/Selection Specialist, Bureau of Transportation Planning (see address list, page 2). The priced proposal must be submitted in a sealed envelope, clearly marked "**PRICE PROPOSAL.**" The vendor's name and return address **MUST** be on the front of the envelope. The priced proposal will only be opened for the highest scoring proposal. Unopened priced proposals will be returned to the unselected vendor(s). Failure to comply with this procedure may result in your priced proposal being opened erroneously by the mail room.

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.

Qualifications 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 and post the date of the bid opening on the MDOT website. The notification will be posted at least two business days prior to the bid opening. Only bids from vendors that meet proposal requirements will be opened. The vendor 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

A bid sheet(s) must be submitted in accordance with the "Guideline for Completing a Low Bid Sheet(s)" (available on MDOT's website). The Bid Sheet(s) is located at the end of the Scope of Services. Submit bid sheet(s) separate from the proposal, to the address indicated below. The bid sheet(s) must be submitted in a sealed manila envelope, clearly marked "**SEALED BID.**" The vendor's name and return address **MUST** be on the front of the envelope. Failure to comply with this procedure may result in your bid being opened erroneously by the mail room and the bid being rejected from consideration.

PROPOSAL SUBMITTAL INFORMATION

REQUIRED NUMBER OF COPIES FOR PROJECT MANAGER	PROPOSAL/BID DUE DATE	TIME DUE
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PROPOSAL AND BID SHEET MAILING ADDRESSES

Mail the multiple proposal bundle to the MDOT Project Manager or Other indicated below.

MDOT Project Manager

MDOT Other

Mail one additional stapled copy of the proposal to the Lansing Office indicated below.

Lansing Regular Mail	OR	Lansing Overnight Mail
Secretary, Contract Services Div - B470 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Secretary, Contract Services Div - B470 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933
Contract Administrator/Selection Specialist Bureau of Transportation Planning B470 Michigan Department of Transportation PO Box 30050 Lansing, MI 48909		Contract Administrator/Selection Specialist Bureau of Transportation Planning B470 Michigan Department of Transportation 425 W. Ottawa Lansing, MI 48933

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 four (4) 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 Non-Prequalified Work)

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

Michigan Department of Transportation

**SCOPE OF SERVICE
FOR
SPECIALTY SERVICES**

CONTROL SECTION(S): N/A

JOB NUMBER(S): N/A

PROJECT LOCATION: Statewide

DESCRIPTION OF WORK: to Develop Transit Peers for Michigan's Local Bus Transit System and Conduct Peer to Peer Analysis using the National Transit Database

Develop, implement and document methodologies for Michigan DOT to make use of the National Transit Database (NTD) and, as appropriate, other national resources such as: INTDAS, APTA Transit Factbook and the AASTHO/USDOT annual "Survey of State Funding for Public Transportation", on an annual basis to develop transit profiles that will allow for comparison of Michigan to peers.

ANTICIPATED START DATE: August 2011

ANTICIPATED COMPLETION DATE: October 2011

DBE REQUIREMENT: N/A

PRIMARY PREQUALIFICATION CLASSIFICATION(S):

None

SECONDARY PREQUALIFICATION CLASSIFICATION(S):

None

CONTACT INFORMATION

Sandra Lovell, Accountant
Bureau of Passenger Transportation
(517)335-2525
Email: lovells@michigan.gov

Questions regarding this scope shall be submitted in writing to the Project Manager by e-mail.

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BACKGROUND

Peer comparison is an activity where an organization compares its performance to that of similar (“Peer”) organizations using a pre-determined set of performance measures. To provide meaningful results, the measures used in the comparison need to be consistently defined and reported among the different organizations included in the peer comparison.¹

The primary, required tasks for this study are:

- A. Determine the following two peer groups for Michigan’s public transit system as a whole:
 - State to state peers (e.g., Michigan’s entire local transit network against other state’s entire local transit network) if feasible.*
 - Urban network peers to Michigan’s urban network, (e.g., Michigan’s entire urban local transit network against other state’s entire urban local transit network)
- B. Select factors to include in a profile of each entity within the peer group
- C. Use NTD and other data to conduct peer to peer analysis
- D. Conduct initial work for future peer group analysis preliminary peer selection

**State acknowledges finding state to state peers may not be feasible due to lack of reliable data for the rural component. If state to state peer analysis is not feasible, an initial set of possible rural network peers against other state’s entire rural local transit network would be desired.*

DELIVERABLES:

1. Peer Selection

Using national research results as well as other published reports and available resources (such as TCRP Report 141), the consultant will:

- a. Propose factors and methods to identify and select peers.
- b. Upon MDOT approval of those factors/methods, conduct an analysis to determine up to 10 possible peer states, for
 - State as a whole (if feasible)
 - State’s Urban network
- c. Assist MDOT in selecting up to 5 peers for
 - State as a whole
 - State’s Urban network

2. Peer Profiles

¹ From TCRP Report 141: A methodology for Performance Measurement and Peer Comparison in the Public Transportation Industry.

The consultant will review all NTD data available and recommend the content and format of profiles. The profiles will at a minimum include:

- a. Service levels (miles, hours, passenger trips) by mode (MB, DR, VP)
- b. Fleet characteristics
- c. Operating expenses by revenue source
- d. Operating expenses by function
- e. Performance Measures
- f. Operating cost per unlinked passenger trip
- g. Operating cost per passenger mile
- h. Operating cost per vehicle hour
- i. Operating cost per employee work hour
- j. Passenger fare recovery
- k. Population with access to transit (Consultant will determine definition for access to transit.)

Using INTDAS, NTD and other readily available information, the consultant will prepare a profile of Michigan's local transit system and the profile for each of the selected peer states. A profile will be prepared for each of the following:

- a. Michigan as a whole and its five state peers
- b. Michigan's Urban network and its five urban network peers

3. Instruction Manual

The consultant will document the process used to select peers and download and extract peer data profiles. Prepare an instruction manual that MDOT can use each year upon release of the most current year of NTD data. The instructions should be specific as to which spreadsheets, tables, columns, cells to extract data from and specifically how to extract and organize the data for statewide results.

Instructions should also include specific queries that could be requested from INTDAS, NTD or "Survey of State Funding for Public Transportation" (i.e., requests for source data in spreadsheet form) to generate statewide results. The instructions should include how to display the data visually (i.e., pie charts, bar charts, etc.) for both technical and non-technical users and provide any necessary caveats or conditions regarding the data and its usefulness in state by state comparison.

4. Automated Extraction

Develop automated methods/software that MDOT can use to replicate the extraction and storage of data, calculations of profiles, and presentation of results.

5. Optional Tasks:

Complete #1 - #4 for one or more of Michigan's 18 urban transit agencies² with the following caveats:

- a. The factors for each urban agency may differ slightly from agency to agency
- b. MDOT and the urban agency shall select the final five peers, taking into consideration if an agency has already selected peers (for other purposes).

GENERAL INFORMATION:

The Consultant shall furnish all materials, equipment, supplies, and incidentals necessary to perform the Services (other than those designated in writing to be furnished by the Department), 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 the Department consistent with applicable professional standards.

- A. The Consultant's principal contact with the Department shall be through the designated MDOT Project Manager. The consultant shall notify the MDOT Project Manager and obtain approval of all proposed subcontractors for all work that will not to be performed directly by the consultant.
- B. The Consultant's principal contact with the transit agencies shall be through the designated Industry Project Manager.
- C. The Services described herein are financed with public funds. The Consultant shall comply with all applicable Federal and State laws, rules, and regulations
- D. The Consultant agrees to demonstrate knowledge of, and performance in compliance with, the standard practices of the Department and any and all other references, guidelines, and procedures manuals needed to carry out the work described herein in an appropriate manner.

CONSULTANT RESPONSIBILITIES:

Primary Deliverables: The consultant shall provide, to the satisfaction of MDOT, a total of 12 profiles for Michigan local transit using the most recent NTD data available and other MDOT approved sources of data. The profiles will include: six (one Michigan and five peers) for statewide transit; six (one Michigan and five peers) for urban network. The consultant will also prepare a detailed instruction manual that will allow MDOT to prepare these profiles on its own as each new year of NTD data is available.

² Ann Arbor, Battle Creek, Bay County, Benton Harbor, Detroit Department of Transportation (DDOT), Suburban Mobility Authority for Regional Transportation (SMART), Flint, Grand Haven, Grand Rapids, Holland, Kalamazoo, Jackson, Lansing, Livingston, Muskegon, Niles, Port Huron and Saginaw

Additional Optional Deliverable: Up to 108 additional profiles, one for each of Michigan's 18 urban transit agencies and five peers for each of the 18 and an instruction manual that will allow each agency to prepare the profiles on their own as each new year of NTD data is available.

Meetings: The consultant will arrange and conduct meetings with MDOT and its steering committee necessary to carry out the services as may be required by MDOT. Consultant shall provide an agenda as well as a project summary including progress, status and outstanding action items, and prepare minutes of all meetings. Consultant will give attention to critical target dates that may require a large lead-time. Meetings may be monthly, or as needed by MDOT.

Progress: The consultant shall submit monthly progress reports to MDOT. The reports shall include a summary of the work conducted on each task during the previous month, the work anticipated for the upcoming month, problems encountered that require(d) action by MDOT, and an indication as to whether the project is on schedule.

Changes/Extras/Adjustments: The consultant shall notify MDOT immediately of any unanticipated project conditions and any changes, extras, or adjustments before incurring any additional costs.

Contentious Issues: Report any problems, issues, discrepancies, or other items brought to the attention of the consultant. Provide written documentation of the resolution of such issues. Keep MDOT informed of all such issues.

Consultant Deliverables: Collect, properly label or identify, and deliver to MDOT all original diaries, logs, notebooks, accounts, record, reports, other documents, and Project files prepared by the Consultant in the performance of the Agreement, upon completion or termination of the Agreement. Return upon completion or termination of the Agreement, all Specifications, and Manuals, guides, written instructions, and plans, unused forms, and all other documents and materials furnished by MDOT. The Consultant may be responsible for replacing lost documents or materials at a fair and reasonable price.

Format: Final document will be in Microsoft Office Suite and will be delivered to MDOT in electronic format. Documents must be able to be printed on an 8 ½ x 11 sheet. For the final document, text will be minimized and appropriate graphics utilized in order for the document to be easily understood. The exact format for the plan will be established in previous tasks but will likely be in a three-ring binder or a bound document.

Data Access: The consultant is responsible for determining what steps they will need to take to access the necessary NTD data. To the degree mandated by NTD, MDOT will assist the consultant gain access to NTD data that is not readily available on the NTD public website, however, the consultant is responsible for downloading all necessary NTD data and may be required to conduct time-intensive extractions of data from spreadsheets that include nationwide data. All data used by the consultant to prepare the profiles must be readily available to MDOT on an annual basis.

MDOT RESPONSIBILITIES:

MDOT will conduct a review of all interim and major deliverables. Documents will be checked for understandability, readability and accuracy. All plan comments and revisions will be documented and tracked.

MDOT shall provide general monitoring and quality inspection to assure that the study has been completed in reasonable conformance with the requirements and specifications and to determine that the work performed to date by the consultant for services rendered is reasonable and appropriate.

MDOT will help arrange meetings as needed.

REQUIREMENTS FOR PROPOSAL

Interested parties should submit proposals that include, at a minimum, the following information:

1. A statement of qualifications and experience: The statement of qualifications and experience should include, at a minimum, a discussion of the availability of necessary expertise and resources to perform the project requirements either within the firm or through the use of subcontractor(s). The proposal should include a detailed listing of personnel anticipated to be assigned to the project and identify the project director, their qualifications and experience. Specific experience in working with NTD data should be described in detail.
2. A Statement of past projects with similar expectations and the outcome.
3. A Statement of the time schedule for the services and a narrative description of the services that will be delivered.
4. A discussion of the methods of approach to be taken in conducting the project, including but not limited to:
 - a. The results of an initial assessment of data currently available on the NTD website and an assessment of the steps the consultant will need to take to make use of that data for the specific purposes laid out in this request for proposal.
 - b. An initial assessment of the pros and cons of using NTD data for the specific purposes laid out in this request for proposals.
5. A certification of willingness to comply with federal and MDOT regulations, reporting and contracting requirements. (FTA Contract Clauses are attached)
6. Names and qualifications of persons authorized to conduct negotiations.

7. Milestone schedule with associated costs.
8. Derivation of Cost.

EVALUATION CRITERIA

The proposals will be evaluated on technical and cost based on the following criteria:

1. Qualifications and experience – 40 points

- Demonstrated understanding, ability and experience in accessing and making use of NTD data. Including the depth and breadth of the initial assessment conducted of the data currently available on the NTD website and of the initial assessment of the steps the consultant will need to take to make use of that data for the specific purposes laid out in this request for proposal.
- Demonstrated understanding of the project objectives and scope. Include any work item you believe should be added to the scope of services or any work item that is in the current scope of service you believe should be altered to achieve the desired deliverables.
- Demonstrated ability and experience in the area of transit performance management and peer grouping.
- Demonstrated ability to be flexible in the development of peer group factors and the content and format of profiles response to the needs of the Department.
- Sensitive to the different needs and circumstances of the transit industry.

2. Quality of Proposal – 35 points

- Demonstration of the consultants understanding of the local public transportation services in Michigan.
- Responsiveness to the requirements of the project as set forth in this RFP.

3. Quality of the team, presentation and interview (if requested) – 20 points

- Structure of the Project Team (Personnel and Roles) – Describe the structure of the project team including the roles of all key personnel and if applicable, the subcontractor. For each subcontractor, describe the role in service and include what percent of the named role the subcontract is expected to provide.
- Demonstrated effectiveness of oral and written presentation.
- Staff Service Experience – Provide resumes for each of the key staff of the prime and subcontractor(s). The resume is limited to three (3) pages per key staff member. It should include any current contact information.
- Participation of the project manager, as well as members of the team.

4. Price – 35 points

- Total cost of project

IMPORTANT: ONLY PRICE FOR THE REQUIRED DELIVERABLES WILL BE USED IN THE SELECTION PROCESS. THE PROPOSAL SHOULD ALSO INCLUDE A “PER AGENCY” PRICE FOR CONDUCTING THE OPTIONAL TASK FOR EACH OF THE 18 URBAN AGENCIES. ONCE THE VENDOR IS SELECTED, MDOT WILL DETERMINE IF ANY, AND HOW MANY, PROFILES WILL BE DONE FOR 18 URBAN AGENCIES AND THEIR PEERS

CONSULTANT PAYMENT – Milestone:

The type of contract will be lump sum with milestones basis. All milestone payment percentages are negotiable except for the Final Deliverable package. MDOT may authorize payment if a milestone is delayed due to circumstances beyond the consultant’s control. Before payments are processed, milestones will be subjected to approval by MDOT.

Compensation shall be divided into payments for the completion of a portion of the services (deliverables). An example would be as shown below:

The proposal shall include a recommended milestone progress schedule.

Completion and approval of Deliverable Number 1 (partial): MDOT Approval of Factors to be Used in Peer Selection	10%
Completion and approval of Deliverable Number 1 (partial): MDOT Approval of Peers	10%
Completion and approval of Deliverable Number 2 (partial): MDOT Approval of Content and Format of Profiles	20%
Completion and approval of Deliverable Number 2 (partial): MDOT Approval of Profiles	20%
Completion and approval of Deliverable Number 3: MDOT Approval of Instruction Manual	20%
Completion and approval of Deliverable Number 4: MDOT Approval of Automated Extraction	20%
Total Service	100%

Consultant Payment (Optional Deliverables and Tasks) – Milestone

Consultant will be paid on a “per agency basis” using the same milestone progress schedule for the required deliverables and tasks.

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

CONSULTANT BID SHEET - MILESTONE

Consulting Services to Develop Transit Peers for Michigan’s Local Bus Transit System and Conduct Peer to Peer Analysis using the National Transit Database

It is required that this bid sheet be completed and submitted with the response to the Request for Proposal. All entries on this page must be handwritten in ink or computer generated. When price is a component of the selection process it will be considered along with several other selection criterion for determining overall score. Priced proposal costs will be required after selection, in accordance with the MDOT Priced Proposal Guidelines (Guidelines). MDOT reserves the right to reject any or all bids.

MILESTONE/DELIVERABLES

PRICE

All entries on this page must be handwritten in ink or computer generated.

Peer Selection - Deliverable Number 1	\$ _____
Peer Profiles - Deliverable Number 2	\$ _____
Instruction Manual - Deliverable Number 3	\$ _____
Automated Extraction – Deliverable Number 4	\$ _____

TOTAL BID PRICE: \$ _____

OPTIONAL DELIVERABLES

Includes all four deliverables: Peer selection; Peer Profiles, Instruction manual, Automated Extraction.

Cost Per Urban Agency for 5 Agencies:	\$ _____
Cost Per Urban Agency for 10 Agencies:	\$ _____
Cost Per Urban Agency for 18 Agencies:	\$ _____

Consultant Name:	
Consultant Signature:	
Consultant Address:	
Date:	

The Michigan Department of Transportation reserves the right to reject any or all bids