



**Central Oregon Intergovernmental Council
Informal Request for Proposals
For Transportation Consulting Services**

Project Name: COIC Transportation Service Optimization Study CET 20-11

Project Location: Central Oregon - Crook, Deschutes and Jefferson Counties and the Confederated Tribes of Warm Springs

Proposal Submittal Deadline: September 7th by 5:00 p.m. Proposals must be submitted electronically (via email) to the Single Point of Contact below no later than the submission deadline.

Single Point of Contact:

Drew Orr, Fiscal Administrator
Central Oregon Intergovernmental Council
E-mail: dorr@coic.org

SECTION 1.0 SOLICITATION INFORMATION AND REQUIREMENTS

1.1 SUMMARY OVERVIEW and CONTRACT OBJECTIVES

To develop an optimization study which will guide COIC's transportation division to use its various services in the most equitable, effective, efficient and customer-friendly manner.

Project outcomes will include (a) a SWOT analysis (Strength, Weaknesses, Opportunities and Threats) of the transportation system (b) a list of industry benchmarks and performance metrics to reference to for on-going guidance, (c) recommendations on resource shifting and/or outsourcing components of operations, and (d) a synopsis on how Intelligent Transportation Systems (ITS) can play a significant role within the transportation optimization process.

Proposers responding to this solicitation do so solely at their expense. COIC is not responsible for any Proposer expenses associated with the responding to this solicitation or subsequent contract negotiations. The selected Proposer and COIC will negotiate the delivery schedule, costs and final Statement of Work, within the scope of what is advertised here, for inclusion in the final contract. The contract is anticipated to start October 1st 2020, and is expected to be completed by January 31st 2021. Pending successful negotiations, the selected Proposer shall perform its obligations according to the negotiated Professional Service Agreement.

Payment.

Payment will be made for completion of tasks and deliverables in conformance with a negotiated Professional Service Agreement. The method of compensation will be Fixed Price per Deliverable.

1.2 QUESTIONS AND CLARIFICATIONS

1.2.1 PROPOSER QUESTIONS

All inquiries, whether relating to this solicitation process, administration, deadline or award, or to the intent or technical aspects of the services must be submitted in writing via e-mail to the Single Point of Contact for this solicitation identified on page 1. **Failing to follow the foregoing requirements regarding the Single Point of Contact for inquiries may result in Proposal rejection by COIC.** All questions must be received not later than 5 business days prior to the Proposal submission deadline.

1.2.2 ADDENDA

Answers to questions COIC receives and that COIC, in its sole discretion, determines are substantive and provide new information, will be issued as official Addenda to this solicitation. When appropriate, as determined by COIC in its sole discretion, revisions, substitutions, or clarifications of the solicitation will be issued as Addenda to this solicitation. Changes or modifications to this solicitation will be binding on COIC only if in the form of written Addenda issued by the COIC. COIC will provide any Addenda to all firms who have expressed interest in this solicitation via an email to the Single Point of Contact.

1.3 PUBLIC RECORDS

After the evaluation/selection and negotiation process is complete, Proposals will be open to public inspection in accordance with ORS 279C.410. If a Proposal contains any information that may be considered exempt from disclosure under the various grounds specified in Oregon Public Records Law, ORS 192.311 through 192.478, the Proposer must clearly designate the portions of its Proposal that Proposer claims are exempt from disclosure, along with a justification and citation to the authority relied upon. Application of the Oregon Public Records Law shall determine whether any information is actually exempt from disclosure. Identifying the Proposal in whole as exempt from disclosure is not acceptable. If Proposer fails to identify the portions of the Proposal that Proposer claims are exempt from disclosure and the authority used to substantiate that claim, Proposer is deemed to waive any future claim for non-disclosure of that information.

1.4 PROPOSAL SUBMISSION REQUIREMENTS (“PASS/FAIL” & “REQUIRED” ITEMS)

1.4.1 PROPOSAL SUBMISSION DEADLINE (PASS/FAIL)

COIC will not accept Proposals submitted after the Proposal submission deadline indicated in this solicitation. Proposal must be received at the correct address on or before the due date and time indicated on page 1. COIC is not responsible for and will not accept mis-delivered Proposals.

1.4.2 DELIVERY ADDRESS (PASS/FAIL)

Submittals must be electronically delivered to COIC's Fiscal Administrator, Drew Orr at dorr@coic.org. Hard copy proposals will not be accepted. Proposers may request an e-mail confirmation from single point of contact.

SECTION 2.0 PROPOSAL EVALUATION & CONSULTANT SELECTION

2.1 EVALUATION PROCESS

2.1.1 EVALUATION

Proposals in accordance with the Pass/Fail criteria identified in Section 1.4 will be evaluated. Proposals will be evaluated using three factors; applicable experience of the firm/assigned staff, description of the firm's intended approach and a cost proposal. Proposers should include two detailed descriptions of similar projects recently completed within their proposal.

The outcome of the Evaluation process may, at the COIC's sole discretion, result in:

- Notice to Intent to Award;
- Further steps to gather additional information for evaluation, (e.g. checking references, notice of placement on an interview list, requesting clarification); or
- Cancellation of this procurement.

2.1.2 INTERVIEWS/FOLLOW-UP QUESTIONS

COIC may conduct interviews/follow-up questions. If interviews/follow-up questions are conducted, the following will apply:

The number of Proposers selected for interviews/follow-up questions is at the sole discretion of COIC.

2.1.3 COIC QUESTIONS

COIC may require any clarification it needs to understand the Proposer's Proposal. Any necessary clarifications or modifications which are in the best interest of the COIC may be made before the Proposer is awarded a contract, and some or all of the clarifications or modifications may become part of the final contract.

SECTION 3.0 STATEMENT OF WORK (or) SUMMARY of TASKS, DELIVERABLES & SCHEDULE, and PROJECT DESCRIPTION

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Study Area

Crook County, Deschutes County, Jefferson County and the Confederated Tribes of Warm Springs

Project Objectives

Project must complete the tasks, and provide the deliverables described with Section 1.1.

Project Management

The COIC Project Manager will guide development of the feasibility study. The COIC Project Manager shall review Consultant Progress Reports and Billings and recommend approve payment. The COIC Project Manager reserves the right to reevaluate the process at the end of each deliverable to determine if the study is progressing in the manner it was intended.

Expectations about Written and Graphic Deliverables

Deliverables must be written concisely and use a simple and direct style so that they can be read by as large an audience as is reasonable and understood independently of one another and to easily convey regional and individual community-based plan materials. Where possible, information must be presented in tabular or graphic format, with a simple and concise accompanying narrative. All written and graphic deliverables will be made available in alternative formats. Upon request, Contractor shall read summaries or descriptions of written or graphic deliverables into a recording for people who cannot read or are visually impaired.

All Draft written (text) and graphic deliverables may be transmitted electronically. Electronic versions of written (text) deliverables must be in DOCX (Microsoft Word) format. Graphic deliverables must be converted to PDF format. All written and graphic deliverables must be substantially complete in draft version, needing minimal editing, and include the project name, a title that refers to the deliverable, draft number, subtask number and date of preparation. Electronic versions of base and plan maps must be in color, but legible in black and white when reproduced. Files from the creation of graphics, including maps, must be provided in their native editable format as well as PDF format. Maps must include details necessary to ensure usability, such as city limits, urban growth boundaries, street names, relevant environmental and cultural features, legend, date, etc. Maps must be at a scale that is legible and in proportion for the intended purpose.

Unless otherwise stated in the following tasks, entities preparing deliverables will make them available on an established file sharing site or shared folder at least one week prior to scheduled meetings for which they are intended to be complete.

TASKS, DELIVERABLES and SCHEDULE

The tasks needing to be completed, and the required deliverables are described within Section 1.1. COIC would like to have this project completed by December 31, 2020. The schedule for these items to be completed shall be negotiated.

SCHEDULE 1.1

Description of Services (Scope of Work)

Project Background

COIC, under its transportation division, operates a range of transit services from fixed-route operations in the City of Bend to rural on-demand services to recreational shuttle services. Due to this wide spectrum of service models, COIC understands it may not be operating its assets and labor resources to its fullest and most equitable potential. Therefore, COIC is pursuing a study to help optimize its current operations.

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It is important to note that COIC is open to unorthodox methodologies and unconventional thinking to support a more equitable, inclusive system to address operational issues. Mundane, routine, easy-to-implement ideas such as adding more buses or requesting more state/local funding is not the solution sought after in this study. COIC welcomes modern, innovative thinking to build and sustain an efficient and attractive transportation system for all users.

Project Tasks

Task #1: Benchmark and Productivity Standards Chart

Develop a chart with the following information:

- Service model and its potential productivity metrics
- Service model and its benchmark with other transit agency's productivity/costs
- Industry metrics on services not performed within COIC
 - a) micro-transit style metrics (cost/ride, response time (in minutes), rides/hour)
 - b) micro-transit style service features (smart phone ride request, 15 minute pick-up upon request)
 - c) automated billing/reporting

Task #2A: Develop a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) of COIC's transportation system.

Details include:

- Outlining all service models and its current productivity metrics
- Outlining all grant sources and funding associated with each service model
- Outline all operational and administrative processes supporting Dial-A-Ride, NEMT, and Fee-For-Service. Factors to consider include, but are not limited to,
 - Geography
 - Funding
 - Administrative processes
 - Audit/Compliance procedures
 - Labor Union Relations

Assumptions:

- Agency will provide Consultant with all service model data
- Agency will allow Consultant inside Call Center and Dispatch Operations for observance

Task #2B: Agency Peer Competitive Comparison

- Agency Peer Competitive Comparison relative to weakness and threats found in Task #1a
- Agency Peer analysis on how transportation and health care are playing a larger role in transportation operations
- Agency Peer analysis on how ITS/CAD/AVL plays a role in service planning and operation

Task #3: Regional Transportation Gap Analysis

- Analysis of regional transportation needs and gaps in service
- Determination if COIC should fulfill those needs and gaps
- Gaps in service, with a focus on underserved populations

Task #4: Local Officials/Stakeholder Outreach/Public Perception

- Identify cultural themes and perception surrounding transit, particularly from city officials
- Identify transportation needs that are not being met in our region, particularly from human services groups, veterans, older adults and those needing services outside of the NEMT/Medicaid network
- Identify how the UGB's in Central Oregon cities play a role in the future of transit

Assumptions:

- Agency will provider rider and operator feedback collective through the 2040 Transit Master Plan process in 2018 - 2020

Task #5: System Changing Recommendations, Resources Required, and Next Steps

- List of recommendations at the service level to increase efficiencies and productivity of system
- List resources needed to make these recommendations feasible
 - Identify how does ITS/CAD AVL plays a role
- Provide a list of prevention-type strategies to avoid falling back into status-quo operations
- List of Next Steps to undergo system optimization

Task #6: Preventative Maintenance/Fleet Operations (if funding allows)

- Examine current protocols related to fleet operations (i.e. preventative maintenance, facility space) to determine if current operations are appropriate, has room for improvement, and/or certain components should be outsourced.