



Northeast Ohio Areawide Coordinating Agency

NOACA

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Request for Proposals (RFP) for Implementing a Regional Household Travel Survey

Issue Date: December 12, 2022

Closing Date: ~~January 9, 2023~~ January 16, 2023

This RFP includes a Disadvantaged Business Enterprise (DBE) Goal of 12%

NOACA is seeking a qualified firm to contract for consulting services to implement a Regional Household Travel Survey. The deadline for submittals is **Monday, January 9 16, 2023, 5:00 p.m.**

TABLE OF CONTENTS

1. THE NORTHEAST OHIO AREAWIDE COORDINATING AGENCY (NOACA)	3
2. INTRODUCTION and BACKGROUND	4
3. SCOPE AND PROJECT DETAILS	6
4. QUALIFICATIONS	10
5. PROCUREMENT TIMELINE	10
6. REQUIREMENTS	11
7. ADMINISTRATIVE PROCEDURES AND CONDITIONS	15
8. QUESTIONS	16

1. THE NORTHEAST OHIO AREAWIDE COORDINATING AGENCY (NOACA)

The Northeast Ohio Areawide Coordinating Agency (NOACA) is a Cleveland-based transportation and environmental planning organization that serves as the metropolitan planning organization (MPO) and designated areawide water quality management agency for the counties of Cuyahoga, Geauga, Lake, Lorain, and Medina in Ohio.

In these capacities it:

- Works with other organizations to help address northeast Ohio's transportation, air quality, and water quality needs
- Conducts metropolitan planning for various modes of transportation, including vehicles, freight, transit, bicycle, pedestrian, etc., while considering the transportation system's impact on the environment and land use
- Prepares the region's long-range transportation plan and short-range transportation improvement program, which is the region's capital budget for federally funded transportation projects
- Conducts studies that address congestion, improve safety and strengthen community livability

The vision of NOACA is as follows: NOACA will **STRENGTHEN** regional cohesion, **PRESERVE** existing infrastructure, and **BUILD** a sustainable multimodal transportation system to **SUPPORT** economic development and **ENHANCE** quality of life in Northeast Ohio.

NOACA is directed by a 46-member Board of Directors, representing the City of Cleveland and all five NOACA counties and their communities, plus transit agencies, the Northeast Ohio Regional Sewer District (NEORS), the Cleveland-Cuyahoga County Port Authority, the Ohio Environmental Protection Agency (Ohio EPA), the Ohio Department of Transportation (ODOT) and the Ohio Turnpike Infrastructure Commission.

The NOACA region is home to 2.1 million people and over 150 units of government. The region is anchored by several urban core cities with the largest being Cleveland.

More information about NOACA is available on our website at www.noaca.org

2. INTRODUCTION and BACKGROUND

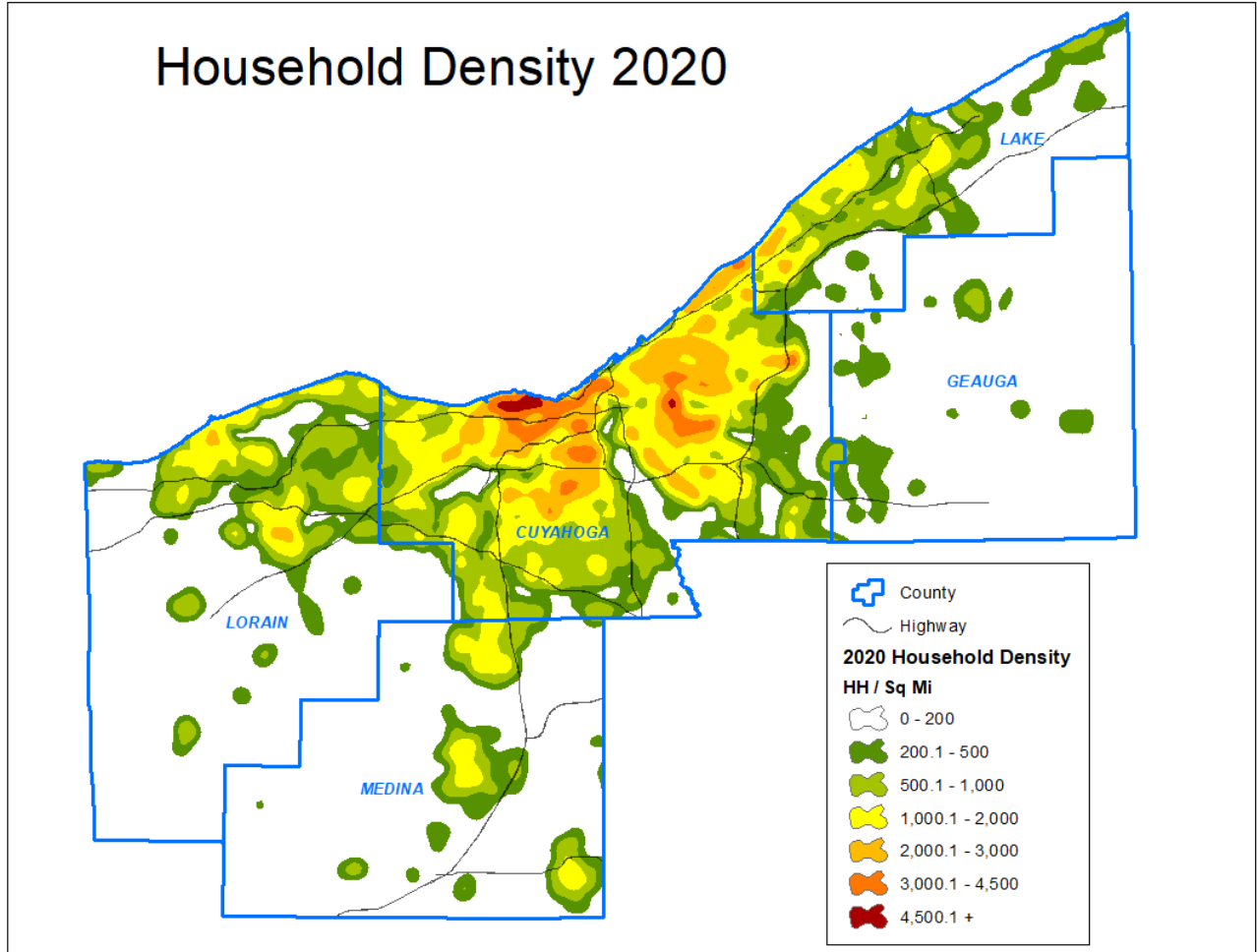
NOACA's once-in-a-decade regional Household Travel Survey (HHTS) provides a detailed picture of the daily travel patterns of people who call the Northeast Ohio region home. In addition to analyzing travel trends for key planning and programming activities, this survey will mainly be utilized for calibrating and validating the NOACA travel forecasting model and updating its socioeconomic parameter values. It should be noted that the regional air quality conformity analysis and Long Range Transportation Plan are based on the calibrated and validated NOACA travel forecasting model. The NOACA travel model provides structured forecasts that establish an understanding of how our transportation system performances and the impacts of our projects. These models are powerful transportation planning tools for examining and assessing our work as well as for identifying how our transportation system is likely to perform in the future. At a macroscopic level, the NOACA Travel Forecasting Model provides insights regarding highway and transit network performances based on projections of future traffic patterns, and strategies for expansion and improvement of our transportation system.

The travel survey is based on a randomly selected sample of households in the NOACA region and its adjacent areas. In this survey, socioeconomic data and information about daily travel behavior are collected from all members of the selected households.

NOACA is seeking a qualified consultant to conduct a Global Positioning System (GPS)-based HHTS in five counties of the NOACA region. NOACA has identified a survey approach and scope, with six major task and deliverables, which are outlined below. Alternatively, the consultant may propose a different survey approach.

This survey will collect information about daily personal trips of households in the NOACA region through the use of interview, trip diary, and web-based interaction, among other methods. The household sample size should be at least 9,000, which is about 1% of the total number of households in the NOACA region. Although the household samples will be selected randomly, the number of households selected for interview in each county should be proportional to the population residing in that county. Figure 1 displays the household density in the NOACA region based on the 2020 census.

Figure1: 2020 Household Density in the NOACA Region



3. SCOPE AND PROJECT DETAILS

NOACA is seeking a qualified consultant with experience in collecting comprehensive data on daily household travel patterns. The NOACA HHTS shall utilize various data collection methods, including GPS technology, to analyze daily travel patterns of household members between the ages of 13 and 75. The household data to be collected shall include, but is not limited to:

- General household and socioeconomic data:
 - Household size (1, 2, 3, 4+)
 - Lifecycle information (household with children or without children, student, retired, etc.)
 - Household and individual income levels
 - Employment status
 - Number of workers
 - Vehicle ownership (0,1, 2, 3+)
 - Number of drivers
- Household member demographics:
 - Gender
 - Age
 - Transportation-limiting disability
- Travel pattern data
 - Purpose of the trip (work, shopping, social, etc.)
 - Mode of travel of the trip (Auto, transit, walk, bike, etc.)
 - Time of day and day of week of the trip
 - Length of trip
 - Duration of the trip

The consultant will be responsible for collecting data from a stratified sample of households in the NOACA region. The households shall be selected randomly from five counties of Cuyahoga, Geauga, Lake, Lorain, and Medina, and from the bordering counties of Summit and Portage. The required household sample size from the five counties of the NOACA region and adjacent counties are estimated at:

- 5,500 households from Cuyahoga County
- 350 households from Geauga County
- 1,200 households from Lorain County
- 900 households from Lake County
- 700 households from Medina County
- 350 households from the bordering counties whose members travel to the NOACA region on daily bases for various trip purposes

The NOACA HHTS will include two surveys: a) pilot survey and b) main survey. The methods and interview materials of the main survey will be tested during a pilot survey and then evaluated and adjusted accordingly.

The consultant will be responsible for designing a state-of-the-art survey and testing it during the pilot phase. These tasks will be followed by proposing a sampling plan.

Tasks and Deliverables

Task 1 – Survey Management

- Develop Survey Management Plan (SMP)
The SMP is the main planning document describing how the survey will be managed. The SMP is a living document and should be updated throughout the survey implementation. At a minimum the plan should contain:
 - Survey overview
 - Scope
 - Methodology
 - Schedule
 - Budget
 - Project team
 - Risk management
 - Communication
- The completed SMP should be submitted to NOACA within two (2) months of contract execution.
- The Consultant will generate monthly reports to include expenditures to date, summary of survey status in relation to project timeline, and deliverables completed.
- NOACA and Consultant will conduct monthly check-ins virtually or in-person to track survey progress.
- Consultant will facilitate and provide materials for quarterly regional working group meetings (consisting of stakeholders) to be held in-person at NOACA offices or virtually, as determined by NOACA Project Manager. The purpose of the regional working group is to provide guidance and technical input into the survey development and help coordinate the survey deployment.
- Consultant will facilitate a minimum of three (3) in-person or virtual presentations to show progress during and after execution of the survey to the communities in the NOACA region. Consultant will also present the survey methodology and results at NOACA Board and Committee meetings.

Task 2 – Survey Methodology:

The Consultant will design effective survey instruments and a travel diary in English and Spanish, to be used for various methods of data collection such as mail, web-based, phone, virtual interview, etc.

At a minimum, the following data items shall be included in the questionnaire and travel diary:

- Household size
- Number of autos available in household
- Number of workers in household
- Household Life Cycle (retired, presence or absence of children in household, etc.)
- Age of respondent
- Whether respondent is a licensed driver

- Household Income
- Work benefits (teleworking, parking pass/subsidy, transit pass, compressed work week)
- Usual Work location
- Usual School location
- Occupation
- Number of long distance (50 miles +) non-commuting trips taken in past month
- Education level

Also, in addition to the usual questions about a full-day travel – departure times, arrival times, purposes, locations (XY coordinates), modes, auto occupancy, etc., the following questions need to be asked:

- Number of household members in travel party
- Whether trip was made for non-goods delivery commercial movement, such as mid-day work-related meeting, service visit (electricians, plumbers, etc.), sales call etc.
- Whether trip was made for goods-movement – including trucks to/from garages and distributions centers as well as parcels

Deliverable: Develop survey instruments and travel diary in English and Spanish.

Task 3 – Pilot Survey:

The consultant, with guidance from NOACA, will conduct a pilot survey to evaluate the proposed survey methodology. The pilot survey will include all components of the survey process, testing results and recommended adjustments.

Deliverables: Develop survey instruments and travel diary in English and Spanish. Conduct pilot survey and present results. Update instruments and diary based on feedback.

Task 4 – Sampling Plan:

The Consultant will develop a sampling plan for data collection using the most updated sampling methodology, and with a goal of completing surveys for a minimum of 9,000 households. For the purpose of equity, the sampling plan should ensure that each county's sample is mathematically proportional to the County's population within the NOACA region, and is representative with regard to its respective racial and socioeconomic composition. Stratifications should consider household density, urbanized/rural areas, housing types such as single and multi-family housing, mixed-use land uses, accessibility to transit and highway systems, modes of travel, etc. The plan should take into consideration that over-sampling may be needed to ensure that a statistically representative number of observations are obtained for zero-car households, low income households and renters.

Deliverable: Develop a report that describes the sampling plan based on random selection, regional distribution and participation that is representative of the County's demographic and socioeconomic attributes. The proposed methodology should be well-grounded in statistical theory.

Task 5 – Main Household Travel Survey:

The Consultant will conduct a full survey using the survey procedures finalized in Tasks 2, 3, and 4. Completion of Task 5 will be based on the quantity and quality of household responses.

Deliverable: Conduct main Household Travel Survey.

Task 6 – Data Processing and Analysis:

The Consultant will perform data verification, data processing, and quality control on the raw survey records. The data will be checked for logic and consistency in the responses. Address data will be geocoded to the current State Plane (NAD 83) Ohio North X,Y coordinates and the current and/or planned Traffic Analysis Zone (TAZ) structure. Those trip records indicating a trip which either originates or terminates outside of the NOACA region will be assigned to the external TAZs provided by the NOACA modeling team.

Once inconsistencies are resolved, the Consultant will propose and implement weighting of the survey data to provide an expanded dataset. The Consultant will also perform descriptive statistical analysis on the weighted and unweighted data.

Deliverable: Develop and submit a report summarizing the data processing and analysis procedure, including the verification and weighting methodologies, along with the results of the performed descriptive statistical analysis. In addition, the consultant will provide NOACA with all survey data and information collected throughout the survey efforts in digital tabular formats as well as GIS files.

Timeline: The proposed timeline for the project will be 9 -12 months from the date of contract signing.

4. QUALIFICATIONS

Any combination of skills and experience that can successfully and effectively address the scope of services will be considered. See Section 6.

5. PROCUREMENT TIMELINE

January 9 16, 2023, 5:00 p.m. - Deadline for RFP Submittals

Submittals must be received at NOACA by the above deadline. Proposals shall be submitted in PDF via email to procurement@mpo.noaca.org. NOACA assumes no responsibility for formatting or transmission errors. Submittals received after the deadline will not be considered. Please reference “Regional Household Travel Survey” in the email subject line.

January 2023 - Consideration of Submittals

An evaluation team will select candidate vendor(s) from submittals received. This process will include review and scoring of proposals, and review of references and other information as necessary. Candidate vendors may be interviewed by the team and asked to enter into negotiations as part of the selection process.

February, 2023 - NOACA Board Committee Review Process

March 2023 - Approval of Contract by NOACA Board of Directors

6. REQUIREMENTS FOR TECHNICAL PROPOSALS AND CRITERIA:

Requirements for Technical Proposals

A. General Instructions

NOACA will not reimburse proposers for costs incurred prior to award and execution of a contract, including but not limited to the preparation and submittal of proposals or participation in the evaluation and negotiation process.

Proposals should be comprised of two (2) volumes, submitted in PDF format. No price or price-related information shall appear in Volume I, the Technical Proposal.

Proposals shall clearly address the information requested herein and evaluation criteria. Overly elaborate proposals and proposals containing only generalized marketing information are discouraged and may result in a lower evaluation score.

Firms included on the current Excluded Parties List System maintained by the United States General Services Administration, or on comparable lists of suspended or debarred firms maintained by the State of Ohio or jurisdictions within NOACA's service area are not eligible for selection.

Provide the information requested in the order listed, with a cover letter signed by an officer of the firm. Do not send additional forms, brochures, or other material.

B. Volume I – Technical Proposal

1. List the project manager and other key staff members. Identify which staff members will be responsible for each project deliverable. Attach resumes that describe the education, experience and professional certifications (e.g. Professional Engineer, American Institute of Certified Planners) for each key staff person. Highlight experience and education relevant to the project. NOACA reserves the right to approve or reject any staff members assigned by primary vendor to this project.
2. List sub consultants and the percentage and type of work to be performed by each sub consultant. Attach resumes that describe the education, experience and professional certifications (e.g. Professional Engineer, American Institute of Certified Planners) for each sub consultant. Highlight experience and education relevant to the project. NOACA reserves the right to approve or reject any sub-consultants assigned by primary vendor to this project.
3. Describe the capacity of your team and their ability to perform the work in a timely manner, relative to present workload, and the availability of the assigned staff.
4. Provide a listing of all prior work on other projects that are similar in scope to this project. Examples should describe the scope of work, and demonstrate successful performance in completion of projects of similar scope and size. The list of prior projects should include assignments undertaken in the past five (5) years, and also identify the duration of the project and the client. Provide contact information (name, title, email, and telephone) for each client. NOACA may contact references as well as other resources to verify a firm's qualifications, experience, professionalism, and ability

to perform the work. If any such projects were not satisfactorily completed, provide an explanation of the circumstances.

5. Provide a table of projected deliverables and estimated completion dates. The table template is attached at the end of this document.
6. Provide a description of your Survey Approach. The Survey Approach will explain how the consultant will implement the Household Travel Survey. The Survey Approach should detail the tasks needed and highlight innovation and creativity.
7. Provide a method for meeting NOACA's current Disadvantaged Business Enterprise (DBE) Goal for the Household Travel Survey implementation, which is 12%. The DBE goal for the Household Travel Survey was determined by the Ohio Department of Transportation (ODOT). This means that at least this percent of the project work (in US dollars) shall be performed by certified DBE firms. The required goal of 12% DBE participation will be enforced and monitored for attainment on the individual project for which firms have been selected. A directory of certified DBEs in Ohio can be accessed on the UCP website at:

<https://www.dot.state.oh.us/Divisions/ODI/SDBE/Pages/DBE-Directory.aspx>.

Vendors may also access the website www.ohioucp.org to obtain information on how to become certified. To qualify for certification as a DBE, an applicant must meet the eligibility standards established in the federal regulations at 49 CFR Part 26 and 13 CFR Part 121. DBE certification must be in place at the time of proposal submittal and throughout performance of the contract.

If 12% DBE cannot be met, the consultant is required to document good faith efforts to attain this goal. Guidance on adequate good faith effort can be found in Title 49, Subtitle A, Part 26, Appendix A of the Code of Federal Regulations.

B. Volume II - Business Proposal

The Business Proposal shall include the following components:

1. A copy of the cover letter included in Volume I, Technical Proposal
2. A pricing proposal. Within the pricing proposal, hourly rates should reflect only the direct cost of labor, and not overhead, burden, or profit. Direct costs such as travel expenses, fixed-price payments to subcontractors or vendors will be reimbursed at cost. NOACA will reimburse approved travel and living expenses only for travel more than 50 miles from the traveler's ordinary work location, at the rates specified in the General Services Administration's most current per diem rates for the locality involved.
3. Copies of the proposer's worker's compensation, general liability, professional liability and automobile insurance certificates.

The proposer may identify any proposed exceptions to NOACA’s Terms and Conditions as contained in this RFP, or propose any additional terms it considers appropriate. Such proposed exceptions or additional terms must be specific, and include a clear explanation of the reasons for the exception or addition. Please note that certain terms contained herein are required by law or regulation and cannot be modified.

Example Consultant Selection Rating Form

Category	Total Value	Scoring Criteria	Score
Experience/Qualifications	25	See Exhibit 1, Note 1	
Deliverables	25	See Exhibit 1, Note 2	
Project Approach	25	See Exhibit 1, Note 3	
Project Management	15	See Exhibit 1, Note 4	
References	10	See Exhibit 1, Note 5	
Total	100		

If Applicable: Adequate good faith efforts made to meet DBE goal Y/N

Exhibit 1 - Consultant Selection Rating Form Notes

1. **Experience/Qualifications:** Each consultant will be evaluated in regards to their experience and qualifications appropriate to the Household Travel Survey implementation. Scores should be based on each firm’s experience on similar projects highlighted in the Statement of Qualifications (SOQ). Factors to consider include:
 - a. Resumes of project personnel (including appropriate credentials such as education and professional certifications)
 - b. Highlighted projects similar to the NOACA Household Travel Survey, or those that include applicable elements

2. **Deliverables:** Each consultant will be evaluated based on a projected table of deliverables included in the Proposal, including methodology that will achieve the Household Travel Survey implementation:
 - a. Project components highlighted in the survey, example table of deliverables, and those recommended by the consultant
 - b. Estimated completion dates not extending beyond **June 30, 2024**

3. **Project Approach:** Each consultant will be evaluated based on the approach presented in the Proposal to complete the project. Factors to consider include:
 - a. Demonstrated understanding the NOACA Household Travel Survey project and its objectives
 - b. Methods and strategies to best accomplish all deliverables of the NOACA Household Travel Survey
 - c. Creativity and innovation that will drive the survey process and recommendations

4. **Project Management:** Each consultant will be evaluated based on demonstration of past project management and performance as evidenced in the SOQ and Proposal. Factors to consider include:
 - a. Demonstration of effective past project management, resulting in the delivery of a high quality work product
 - b. Project personnel/consultant firm size capable of managing planning process, or capacity to manage a consulting team and work with sub consultants

5. **References:** References should include appropriate contact information and relevance to the NOACA Household Travel Survey. NOACA may contact references to verify a firm's qualifications, experience, professional character, and ability to perform the work.

Approved Deliverables/Budget Estimate

Table of Deliverables

Deliverable	Description	Percentage of Work (%)	Estimated Date of Completion
Survey Methodology	Survey questionnaires and travel diary documents in English and Spanish.		
Pilot Survey	The pilot survey results and recommended questionnaires and travel diary modifications. The updated survey materials in English and Spanish.		
Sampling Plan	A report discussing the sampling plan based on random selection, regional distribution and proportional representation of the various household stratifications. These discussions should be well grounded in statistical theory.		
Main Household Travel Survey	Conduct survey and collect all survey data and information in digital, tabular and GIS formats.		
Data Processing and Analysis	A report summarizing the data processing and analysis procedure. This report will include all the data verification and weighting, results of the performed descriptive statistical analysis.		
Total		100%	

7. ADMINISTRATIVE PROCEDURES AND CONDITIONS

- A. It is the policy of NOACA, as required by the United States Department of Transportation (US DOT) that Disadvantaged Business Enterprises (DBEs) shall have equal opportunity to compete for this federally assisted contract and/or subcontract with another other consultant to perform the requested services.

This proposal includes a **DBE Goal of 12%**. At least this percentage of the agreement shall be performed by certified DBE firms. The percentage goal may be met if the awarded Contractor is DBE certified. However, in the event the Consultant is unable to meet the DBE goal placed on this project, a good faith effort must be demonstrated, which documents the effort made to secure the services of a DBE subcontractor(s). Guidance on adequate good faith effort can be found in Title 49, Subtitle A, Part 26, Appendix A of the Code of Federal Regulations. This documentation must be included with the proposer's submittal. Consultant proposals that do not include the minimum required percentage of DBE participation, or that cannot demonstrate good faith efforts to include a DBE, **WILL be rejected**. The Consultant's price proposal shall describe the required level of DBE participation.

Only firms certified as DBE through Ohio's Unified Certification Program (UCP) qualify toward meeting this goal. A listing of DBEs certified in Ohio can be accessed on the UCP website at www.ohioucp.org. Potential DBEs may also access the website to obtain information on how to become certified. To qualify for certification as a DBE, an applicant must meet the eligibility standards established in the federal regulations at 49 CFR Part 26 and 13 CFR Part 121. DBE certification must be in place at the time of proposal submittal and throughout performance of the contract.

- B. Consultants agree not to discriminate against any employee or applicant for employment because of race, color, religion, age, creed, sex, sexual orientation or national origin. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. Consultants further agree to comply with all requirements of Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d et seq., 49 C.F.R. Part 21.
- C. The proposal, including price, shall be valid for **at least three months** from the date of submission.
- D. An RFP does not constitute an offer or a contract. No contract may be awarded without approval by the NOACA Board of Directors.
- E. NOACA reserves the right to cancel or reissue the RFP or to revise the timeline at anytime.

- F. NOACA reserves the right to reject any and all proposals and to waive minor irregularities in the proposal process. NOACA may accept any proposal if such action is believed to be in the best interest of the agency.
- G. NOACA is not liable for any cost incurred by the proposer prior to execution of a contract.
- H. The contract between the successful proposer and NOACA shall include all documents mutually entered into specifically, including the contract instrument, the RFP and the response to the RFP. The contract must include and be consistent with the provisions stated in the RFP.
- I. The prime consultant or system provider will be required to assume the responsibility for all services offered in the proposal regardless of whether directly performed by the prime consultant. Further, the prime consultant will be the sole point of contact for NOACA with regard to contractual matters.
- J. The consultant project team shall be approved by NOACA. NOACA must approve any changes in the project team.
- K. Any award of contract will be to the consultant or contractor that provides the highest value relative to costs.

8. QUESTIONS

For questions regarding the RFP, please contact procurement@mpo.noaca.org. All answers will be publicly posted on www.NOACA.org.