

REQUEST FOR PROPOSALS

1999 ACTIVITY BASED HOUSEHOLD SURVEY

Consultant Services Solicited by the Puget Sound Regional Council

Released: **January 15, 1999**

Λ Proposal Submittal Deadline: 7
February 19, 1999
2:00 p.m.

Submit Proposals to:

Gail L. Boyd, Administrative Assistant
Puget Sound Regional Council
1011 Western Avenue, Suite 500
Seattle, Washington 98104-1035

REQUEST FOR PROPOSALS

1999 ACTIVITY BASED HOUSEHOLD SURVEY

DUE: 2:00 p.m., February 26, 1999

I. REQUEST

The Puget Sound Regional Council is requesting proposals from firms to conduct a two-day activity based household travel survey and administer an attitudinal/behavioral questionnaire in King, Pierce, Snohomish and Kitsap counties during the spring of 1999.

The project will be subject to the Regional Council's proposal review and consultant selection process. The available budget for the 1999 Activity Based Household Survey is \$500,000. Submittals must be *received* by **2:00 p.m. on February 26, 1999**.

The Regional Council promotes equal employment opportunity in the evaluation of any proposal and in the award of any resultant contract. The Regional Council's program complies with applicable federal, state and local laws, regulations and procedures. Questions may be directed to Robert Sicko, Project Manager, at 206.464.5325 or email: rsicko@psrc.org.

II. BACKGROUND

The Puget Sound Regional Council is an association of cities, towns, counties, ports, Tribal nations, transit, and state agencies that serves as a forum for developing policies and making decisions about regional growth management, economic and transportation issues in the four-county central Puget Sound region.

The Council is designated under federal law as the Metropolitan Planning Organization (MPO), and under state law as the Regional Transportation Planning Organization (RTPO), for King, Kitsap, Pierce and Snohomish counties. The Regional Council's Interlocal Agreement with member governments establishes the organization's growth management, transportation, database, forum and technical assistance responsibilities. Among the agency's functions are the development of the region's transportation plan, identification of short-range transportation system development needs and financial strategies, development and maintenance of a regional database, and the estimation, forecasting and monitoring of economic, demographic and travel conditions in the region as the foundation for local and regional planning.

Long-range forecasting of urban travel and the effects of transportation policies on travel behavior are very dependent on the measurement of changes. In many areas across the nation, updating of travel demand models relies on information from infrequently conducted

cross-sectional studies; however, in the case of the Regional Council, a rich database using both cross-sectional and longitudinal surveys exists and this effort will enhance the database. A primary focus of this cross sectional survey is the introduction of a more detailed activity based two-day household survey. A follow up survey is anticipated in the year 2001.

Cost efficient survey programs are essential because the funds available to collect and analyze large amounts of data in any particular year are limited. The primary objectives for the activity based survey and concurrent attitudinal/behavioral questionnaire include the following:

1. To obtain data needed for recalibration of the existing trip generation, trip distribution, mode choice, and assignment models for the Puget Sound region.
2. To develop broader, more policy-sensitive forecasting procedures that can be integrated with other modeling tasks.
3. To help us better understand household travel behavior and an individual's activity based decision making process of why, where, how, and when (or whether) to make a trip.
4. To better understand the public's perception and understanding on many of the issues that will be addressed in the updating of the region's Metropolitan Transportation Plan.
5. To supplement the data obtained from the year 2000 Census.
6. To compare and document changes in travel behavior between the results obtained from surveys performed in the late 1980s and today and then potentially compare the results of this survey with survey results from other regions. While comparability to other surveys is a worthy goal, this should be subservient to using the best available capabilities for collecting the required data.

III. PROPOSED SCOPE OF WORK

1. Introduction

The consultant team chosen for this project will work as an extension to the Regional Council staff. A local expert review team has also been established to assist in the oversight of the project. This contract will require data collection for two-day activity based travel diaries in the spring of 1999. Additionally, an attitudinal/behavioral survey, which will potentially include stated and revealed preference components, will be conducted

either concurrently with travel diaries or soon thereafter. All data collection is to be completed by June 1, 1999, with the final product(s) due July 19, 1999. The following is a generalized overview of expectations and methodology.

2. Survey Composition

It is anticipated that a minimum of **5,800** households will be sampled, stratified as follows: 1,000 households each for Seattle/Shoreline, Eastside King County, South King County, Pierce and Snohomish counties and 800 households for Kitsap County. Definitions of the three sub-areas in King County will be provided by Council staff.

3. Method of Recruitment

It is assumed that the consultant will contact potential survey participants using random digit dialing (RDD). The telephone contact/questionnaire, developed by Council staff and subject to modification includes:

- § Household ID number: Created for each household that agrees to do the activity survey
- § Household member data which asked about each person (5 years and older) the following: age, sex, labor force participation, student status, license to drive and person ID number for each member in the household
- § For household members in the labor force—questions relating to primary commute mode, zip code of work location, parking cost/subsidy, number of days worked per week, job classification, and past use of transit or carpooling (last 6 months)
- § Household characteristics: persons in household, income, length at current residence, length of residence in current county, and vehicles by type, age, and odometer reading
- § Mail-out of activity based diaries, attitudinal survey and incentives. A \$2 per person incentive will be mailed to each member of a household participating in the survey

§ Phone reminder at diary completion point. Collection of household and personal data by phone

§ Postcard and phone follow-up for return of forms

3. Travel Diaries

The format of the travel diaries for all households will resemble the sample in Appendix A, but will be modified with the support of the selected consultant to better obtain most activities of a household versus just trips. Travel diaries for all household members age 5 and older will be collected for two consecutive weekdays. The diary will be a mail-out/mail-back survey. A small financial incentive (see method of recruitment) will be provided with the mail-out of the diaries. The sample will be distributed so that diaries are collected for all weekdays (Monday - Friday). The following trip information is to be included:

- § day and date of the diary
- § a box to check if no trips were made
- § start of day location and reason for being at that location

- § address of each destination
- § start and end time of each trip

- § trip purpose

- § trip mode

- § number of persons in vehicle

- § who was traveling together

We have found that diary forms with "open" boxes to be filled in by the respondent are easier for respondents than selecting from a printed set of trip purposes and travel modes. (See Attachment A)

The contractor will need to re-code some responses; for example, to code "get groceries" as "shopping". Address locations, as written by the respondent, will be provided to the Puget Sound Regional Council. *The contractor **will not** be requested to code the addresses to any geographic scheme, but **will** be expected to clean up and standardize addresses as much as possible. The Puget Sound Regional Council will*

provide the contractor with a list of common destinations (schools, ferry terminals, shopping centers, etc.) that include both name and address.

The contractor will review the trip diaries for completeness and accuracy using logical checks. If errors or omissions are found, the respondent will be called to correct the deficiencies.

4. Attitudinal and Behavioral Questionnaire

The primary purpose for administering the questionnaire is to better understand the general public's perceptions and preferences on many of the issues that will be reviewed in the update to the region's Metropolitan Transportation Plan (MTP). Key areas of focus will be on transportation finance, Transportation Demand Management (TDM), transit and high occupancy vehicle usage and non-motorized travel.

To answer many of these policy questions there is a need for both stated choice/stated preference data for hypothetical questions and longitudinal data describing revealed responses to endogenous (e.g., household lifecycle) and exogenous (e.g., change in supply of land and transportation infrastructure, travel costs, and parking supply). Stated preference is essential to estimate the direction and size of likely response to many of the TDM actions that may be proposed --actions that either fall completely outside current experience or are far outside the range of current experience (e.g., congestion pricing of roads or gasoline selling at \$5.00 a gallon).

A similar survey instrument will be used in a concurrent contractual project, Puget Sound Transportation Panel (PSTP) Survey, Wave 8, which is the only transportation longitudinal survey being performed in the United States.

6. Issues

Many issues arise when conducting a household travel survey. They include but are not limited to the following: survey methodology, data collection instruments, non-response, random digit dialing and sampling error and survey bias. When developing the response to this Request for Proposals it is expected that the consultant team will address these issues in some manner. It is extremely important that the issue of non-response and strategies to reduce the impact of non-response be addressed.

IV. TASK DETAILS

The consultant will be required to complete the following tasks:

1. Work with Puget Sound Regional Council staff to finalize questionnaire on personal and household demographics.

2. Implement telephone contact and questionnaire

3. Distribute and collect travel diaries, and monitor quality of collected information
 - § Design and print all survey and diary data collection materials

 - § Mail diary materials to participants
 - § Deliver incentives to participants

 - § Contact participants during the data collection period to encourage and clarify

 - § Clarify and correct data as necessary through recalls

4. Collate and mail out attitude and behavior surveys to all participating household members **16 and over**.

5. Develop and maintain a computer file with name, address, telephone and ID number of households for all participating households and the recruitment method. The following tasks must also be completed.
 - § Code and key data from telephone and mail-back surveys and creation of the database.

 - § Provide full address information for trip origins and destinations
 - § Code open-ended variables according to a mutually agreed upon coding scheme

6. Complete and clean data files (as per Task 5), and deliver with the following specifications: media: 3 1/2" diskette or CD-ROM; database format, ASCII or SPSS data set. Include with the data files a detailed description of the record layout and a data dictionary.

The consultant will be also be required to provide the following reports:

1. Provide a short (one page) monthly progress report within 5 business days following the end of the month listing and overview of work performed (e.g., labor, the number

of surveys mailed, returned, checked, and entered into the computer, etc.). Any problems encountered should be also be summarized.

- 2. Prepare final report as per finalized schedule (see Project Schedule). The report will include a listing by zip code of total households, total surveys mailed out, total phone completions, and total household activity diary and attitudinal questionnaire, documentation of survey methodology and activity survey results and completion rates.

Regional Council Role

- 1. Manage the project.
- 2. Review draft materials
- 3. Provide consultant with mailing lists for transit and carpool users.

V. PROJECT SCHEDULE

The following outlines the project schedule. The schedule may be refined after the consultant selection process has been completed.

A. Consultant Selection Schedule:

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Receipt of p
Interviews
Consultant s
Sign contrac

B. Task Schedule:

Final products will be developed based on the following tentative schedule:

Finalize survey design and recruitment methodology.....March 17,1999
Survey Pre-test March 22, 1999
Household recruitment begins..... March 30, 1999
Begin field work..... April 5, 1999
Last day for diaries June 1, 1999
Deliver interim report.....Monthly
Deliver data files July 1, 1999
Deliver final report July 19, 1999

000. Consultant firms are advised that upon subsequent review, evaluation and discussion of proposals and approaches to the project, the Regional Council may make budget adjustments to optimize achievement of project objectives and opportunities within currently available resources.

CONTRACTOR'S RIGHTS

Authorize the Regional Council to enter into any contracts. The Regional Council reserves the following rights, in addition to those accorded by policy and law:

- The right to negotiate all proposal elements;
- The right to reject any and all proposals, to waive irregularities, and to re-solicit proposals;
- The right to change the scope of work depending on funding available;
- The right to approve any and all subcontractors selected after an award;
- The right to renegotiate the agreement for such additional service as may be necessary; and
- The right to make an award to other than the lowest bidder.

MINORITY BUSINESS ENTERPRISE (DBE) REQUIREMENTS

A goal for minority business enterprises (DBE) has been set for contracts awarded as a result of this RFP.

NONDISCRIMINATION (EEO) REQUIREMENT

The Contractor shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, sexual orientation, disability or national origin. The Contractor shall take affirmative action to ensure that applicants are employed and that employees are treated during employment without regard to their race, color, religion, sex, age, disability or national origin. Such actions shall include, but not be limited to, the following: employment, upgrading, demotions, or transfers; recruitment or recruitment advertising; layoffs or terminations; rates of pay or other forms of compensation; selection for training, including apprenticeship; and participation in recreational and educational activities. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided that set forth the provisions of this nondiscrimination clause. The Contractor shall state in all solicitations or advertisements for employees placed by or on behalf of the Contractor that all qualified applicants shall receive consideration for employment without regard to race, color, religion, sex, age, sexual orientation, disability or national origin. The Contractor shall cause the

foregoing provisions to be inserted in all subcontracts for any work covered by this Contract so that such provisions shall be binding upon each subcontractor. The foregoing provisions shall not apply to contracts or subcontracts for standard commercial supplies or raw materials.

AL.

A. Contents of Proposal

The consultants' proposal format should emphasize clarity and brevity in describing the understanding of the project, approach to each task, schedule, budget and personnel experience. The proposals should be prepared on white bond paper (standard 8.5 " by 11" format) and type should be 12 point.

Five (5) copies and one original copy (in copy ready format) of the consultants' proposals should be submitted to the Regional Council by or before **2:00 p.m. on February 19, 1999**. Proposals will not be reviewed and will be considered non-responsive if they arrive past the noted deadline or exceed a total of 30 pages in length for all required proposal information. The 30-page limit shall include a transmittal letter included within the proposal, signed by the individual(s) from the consultant(s)/team(s) able to commit the resources of the consultant and shall identify the key person and phone number to contact regarding such proposal. This 30-page limit does not include the front and back covers of a proposal, if such are provided.

Each proposal must include the following information:

Outline and description of work required to complete the scope of work presented in Part III and Part IV.

Participation of principal, investigators, key support and technical staff, including estimates of time, number of hours and a cost breakdown by work task for each key participant in the project. Total cost shall not exceed \$500,000.

3. A schedule of deliverables, interim products, and reports.
4. Description of relevant experience and qualifications for each senior person involved in the project.
5. List of persons, with telephone numbers, who can be contacted for reference on relevant experience.
6. Document of equal employment opportunity commitment for the prime and each subcontractor, if any.

B. Designation of Personnel

The proposal should identify and describe the qualifications of the individuals who would work on the project. It should estimate the time availability of each individual

over the period of the project. It should list references who can verify recent experience of each individual.

C. DBE/WBE Participation

Disadvantaged Business Enterprises (DBE) or Women-owned Business Enterprises (WBE) should indicate their ownership status in the qualification statements.

Non DBE/WBE consultants will be expected to provide assurance as to their commitment to equal employment opportunities for minorities and women, as well as to the utilization of DBE/WBEs, if a subcontract is required.

A. Selection Criteria

The primary selection criterion will be the ability of the firm to understand the issues and accomplish the tasks described in Section II (Background) and Section III (Proposed Scope of Work). In particular, applicants ***[ADD ANY SPECIFIC INFORMATION HERE]***

Other selection criteria will include :

Experience and qualifications of principal investigators;

2. Recommendations of references;
3. Ability to work within deadlines and to develop mutually agreed dates for deliverables;
4. Involvement of Disadvantaged Business Enterprise and satisfaction of EEO goals.

B. Selection Process

The consultant selection process will be conducted as follows:

The closing date and hour for receipt of the proposal is **February 19, 1999 at 2:00 p.m.** Proposals received after this date and time will not be considered. In the event that sufficient proposals are not received, the date may, at the Regional Council's sole discretion, be extended until an adequate number of proposals are received.

The proposal review and selection process will require personal interviews with one or more proposing firms. These interviews should begin during the week of March 3, 1999.

3. Selection of the consultant shall be based on the Regional Council's evaluation of the best proposal and best qualified respondent using the criteria and information outlined in Sections X and XI.A. above. Such determination shall be made at the sole discretion of the Regional Council.

Contract negotiations will be initiated immediately upon selection of the consultant. If the Regional Council is not able to negotiate a satisfactory contract scope of services, billing rates, or overhead costs consistent with Federal and State requirements, negotiations will be terminated and the consultant will be notified by mail. In this event, the proposals of the remaining pool of respondents will be evaluated and negotiations will be initiated with the one of the remaining respondents selected in accordance with Section X and XI. A. above, as most qualified to complete the work.

1. This selection process does not obligate the Regional Council to enter into a contract with any of the responding firms.

mat of the Proposals must be **received** by the closing date and time described in Part IV, project schedule. Proposals may be delivered or mailed to the Regional Council offices at the following address:

Gail L. Boyd, Administrative Assistant
j Puget Sound Regional Council
1011 Western Avenue, Suite 500
Seattle, WA 98104-1035

ould be directed to:

Robert T. Sicko, Project Manager
Phone: 206.464.5325
email: rsicko@psrc.org.