



SCOPE OF REQUIREMENTS

1.0. INTRODUCTION

The City of Calgary Transportation Forecasting Division is scheduled to undertake a Household Activity Survey in 2011 to collect data necessary to update the Regional Transportation Model (RTM) and wishes to engage a research consulting firm to design, test and implement the required survey. Work will commence according to the program schedule below, with fielding of the Household Activity Survey to occur in the fall of 2011.

The City of Calgary also intends to investigate the feasibility of transitioning to Continuous Household Activity Survey data collection in 2012 and beyond.

2.0 BACKGROUND

The City of Calgary has maintained a transportation forecasting model since the development of its first model in 1963. The model has been updated on a 10 year cycle with the last update done in 2001 when it was expanded to cover the City of Calgary and the surrounding region. The next update is scheduled for 2011.

The Calgary RTM represents personal travel through an enhanced four step logit model with choice behaviour models for auto peak spreading, mode, time of day, destination, and generation.

Forecasts and scenarios from the RTM are used in a variety of studies ranging from strategic and policy level to site-specific and operational level.

More information on the RTM can be found on the Forecasting Division’s website at www.calgary.ca/transportation/forecasting.

The Calgary Regional Transportation Model coverage includes the City of Calgary and much of the surrounding region. The current RTM coverage is available on the Forecasting Division website www.calgary.ca/transportation/forecasting. It is expected that the updated RTM will cover a slightly larger area.

3.0 PROJECT SCOPE

This proposal is split into two independent categories, Schedules A and B to represent the different work required.

The schedules are as follows:



SCHEDULE A: Household Activity Survey (HAS)

PHASE 1:	HAS Design
PHASE 2:	HAS Pilot
PHASE 3:	HAS Implementation

SCHEDULE B: Continuous Household Activity Survey Feasibility Study

.1 SCHEDULE A: HOUSEHOLD ACTIVITY SURVEY

The purpose of this project is to complete a Household Activity Survey in Calgary and the surrounding region that will provide data to update the RTM. This will be an activity diary survey that will collect data on all activities in a 24-hour period.

3.1.1 SURVEY DESIGN SPECIFICATIONS

The successful Proponent should have extensive experience in the design and implementation of Household Activity Surveys in regions of similar area. The successful Proponent will work with members of The City of Calgary Project Team to design a Household Activity Travel Diary Survey.

- .1 The successful Proponent will be required to provide expertise in developing survey instruments to capture the data required to update the Regional Transportation Model. The design must be flexible enough to meet the needs of the current model and support the development of future models in Calgary.
- .2 The successful Proponent will be required to provide advice on sample frame design, sample size, and recruitment methods to ensure a representative sample for the survey.
- .3 The successful Proponent will be required to provide advice on survey data quality monitoring to ensure sampling targets are met.
- .4 The successful Proponent will be required to provide expert advice on data retrieval methods including GPS surveys, web-based applications, and smart phone applications.
- .5 The successful Proponent will need to be familiar with geocoding methods, survey verification and validation procedures, and survey expansion methodologies and be able to apply that knowledge to the design of the Household Activity Survey.



- .6 The successful Proponent will need to be familiar with reporting on travel behaviour and ensure the survey design collects data that will allow for a comprehensive report on travel behaviour patterns.
- .7 The successful Proponent will be required to ensure that the 2011 Household Activity Survey design is as consistent as possible with the data collected from the 2001 Household Activity Survey.

3.1.2 PILOT SURVEY SPECIFICATIONS

Prior to the implementation of the main survey, it is desirable to test the survey instrument and recruitment methods. The intention of this Pilot Survey is to field test the survey on a small sample size to determine the effectiveness of the survey instrument, refusal rates and costs.

- .1 The successful Proponent should have experience in fielding and evaluating pilot household activity surveys and be able to provide recommendations that include:
 - Recruitment Strategy Effectiveness
 - Survey Methodology Effectiveness
 - Response Rates
 - Survey Costs
- .2 The City of Calgary is a public body legislated by the Alberta Freedom of Information and Protection of Privacy Act, and is bound to protect personal information it gathers. All information collected must be securely stored. It is preferred that this data be stored in Alberta.
- .3 Details regarding the survey design will be determined in Phase 1. These details include but are not limited to the survey instrument, sample size, sample frame, and recruitment methods.
- .4 The pilot surveys are scheduled to take place between 2010 October 18 and 2010 November 15.

3.1.3 MAIN SURVEY IMPLEMENTATION SPECIFICATIONS

Beginning in September 2011, the successful Proponent will be implementing The City of Calgary Household Activity Survey in the City of Calgary and the surrounding region. The purpose of this survey is to collect data necessary to update the Regional Transportation Model and support future model development projects.

- .1 The successful Proponent will be required to provide expertise in fielding large scale transportation surveys and be able to provide the expertise,



staff and equipment necessary to implement surveys of the nature describe in this RFP. This may include but not be limited to:

- Successfully recruit a representative sample
 - Collect survey data
 - Clean and geocode dataset
 - Provide a report on survey results
- .2 The successful Proponent will be expected to field the survey designed in Phases 1 and 2. Sufficient notice will be given to ensure the Consultant can administer the survey beginning in September 2011.
 - .3 The successful Proponent must be prepared to deliver a clean, geocoded survey dataset in Microsoft Access Database format.
 - .4 The successful Proponent will be expected to provide staff and training to recruit households and retrieve data.
 - .5 The successful Proponent will be expected to prepare all printed material necessary for the surveys.
 - .6 The City of Calgary is a public body legislated by the Alberta Freedom of Information and Protection of Privacy Act, and is bound to protect personal information it gathers. All information collected must be securely stored. It is preferred that this data be stored in Alberta.
 - .7 Details regarding the survey design will be determined in Phases 1 and 2. These details include but are not limited to the survey instrument, sample size, sample frame, and recruitment methods.
 - .8 Based on the success of Phase 1 and 2, it is The City intention to award Phase 3 to the successful Proponent. However, The City reserves the right not award Phase 3 or delay the implementation of Phase 3 to a later date if deemed the best interest of The City.

3.4 SCHEDULE B: Continuous Household Activity Survey Program (CHASP)

The City of Calgary wishes to conduct a feasibility study to investigate Continuous Travel Survey data collection. The Continuous Travel Survey Program (CTSP) would collect household activity data on a continual basis rather than the historic 10 year cycles.

The purpose of the CHASP is to collect data over a 10 year period to update the Regional Transportation Model. In addition, The Transportation Data Division requires data to monitor and report on the Calgary Transportation Plan. This monitoring data may include:

- city-wide transportation mode split,
- mode split to the centre city, major and community activity centres,



- number of persons teleworking
- frequency, duration and distance for all purpose trips for all modes

The successful proponent should demonstrate expertise in researching, developing and implementing continuous household activity surveys both for transportation model updates and data monitoring and reporting programs.

The purpose of this project is to investigate Continuous Household Activity Survey Programs and determine the feasibility of conducting such a program in the City of Calgary and, if feasible, develop a CHASP design and implementation plan.

3.4.1 CHASP Feasibility Study

The purpose of this study is to determine if a CHASP is feasible for the City of Calgary.

- .1 Conduct research of CTSP implementation in other jurisdictions and report success and failures
- .2 Identify options for implementation
- .3 Identify likely costs involved with implementation
- .4 Identify risks of implementation
- .5 Identify benefits and non-benefits of implementation for the City of Calgary
- .6 Prepare a High Level Implementation Plan
- .7 Produce a Feasibility Report with recommendations

3.4.2 CHASP Implementation Plan

If recommended by the Feasibility Report in section 3.4.1, the Successful Proponent will develop a CHASP Implementation Plan to transition from historic episodic survey data collection. This plan may include but would not be limited to:

- .1 A Survey Process Design which may include sampling, development of a survey instrument, a quality control process, a database, and identifying deliverables required to implement the program.
- .2 Business Process Design which may include investigating in-house or contract work, labour considerations, seasonal considerations, technology considerations and database management. This would also include identifying the staff, space and equipment requirements.



- .3 Develop a Start Up Budget and the annual budget required to operate the program.
- .4 Processes for Forecasting to use the data in RTM updates.
- .5 Processes for Transportation Data to report on monitoring data.
- .6 Report with implementation recommendations.

4.0. REPORTING REQUIREMENTS AND PROCEDURES OF THE PROJECT

Close collaboration between the successful Proponent and The City’s team is expected and required throughout the duration of the program. Project meetings will be held on an as-needed basis. Project Leads are as follows:

Survey	City of Calgary Division
Household Activity Survey	Transportation Planning, Forecasting Division
Continuous Household Activity Survey Feasibility Study	Transportation Planning, Forecasting Division
	Transportation Planning, Transportation Data Division

5.0 PROGRAM SCHEDULE

The program will be conducted according to the schedule below. Specific dates will be negotiated with the Consultants.

.1 SCHEDULE A: HOUSEHOLD ACTIVITY SURVEY PROJECT TIMELINE

TASK	COMPLETION DATE
Household Activity Survey Design	2010 July
Household Activity Survey Pilot – Field	2010 Fall
Pilot Survey Dataset	2010 November
Pilot Survey Report	2010 December



Household Survey Implementation	2011 Fall
Household Activity Survey Dataset	2012 February
Household Activity Survey Report	2012 February

*The City of Calgary reserves the right to modify any of the above dates.

.2 SCHEDULE B: CONTINUOUS HOUSEHOLD ACTIVITY SURVEY PROJECT TIMELINE

TASK	COMPLETION DATE
Feasibility Report	2010 December
Continuous Survey Implementation Plan	2011 December

*The City of Calgary reserves the right to modify any of the above dates.



EVALUATION MATRIX

The evaluation committee will ensure compliance with mandatory criteria, evaluate and numerically score each compliant Proposal. The evaluation will be restricted to the criteria contained in this section of the RFP.

1. CONFIDENTIALITY OF EVALUATION

Evaluation scores and rankings are confidential, and no details will be released to other Proponents.

2. MANDATORY COMPLIANCE

Submissions will first be reviewed for compliance with the mandatory criteria of this RFP. Mandatory Compliance will be confirmed on a simple pass/fail basis. Proposals not complying with mandatory criteria will be considered non-compliant and will not receive further consideration.

The mandatory criteria for this RFP are:

- .1 Proposal received by Supply Management as per the Instructions for Submitting Proposal.
- .2 Executed Signature and Waiver Sheet
- .3 Signed Addendum (addenda) if applicable.

3. PROPOSAL SUBMISSION REQUIREMENTS

- .1 The intention of this RFP is to select a Proponent or Proponents to negotiate with, based on qualifications, experience and references as included in the Evaluation Matrix. Prices are not required for this RFP. The City will negotiate pricing with the highest rated Proponent.
- .2 Your firm is invited to submit a written Proposal in letter size format. Brevity is appreciated and Proponents are requested to limit their Proposals to no more than fifteen (15) pages. Appendices, organizational charts and personnel resumes are not to be considered in the number of pages. The qualification package should be thoughtfully prepared, neat, concise, professional and containing relevant information.



4.0 EVALUATION MATRIX

Proposals will be evaluated as per the table below:

	Selection Criteria Description	Point Value	X	Rating	Total Score
4.1.1	Project Understanding & Methodology				
	Demonstrates an understanding of the purpose of the Household Activity Survey (HAS)	20			
	Demonstrates an understanding of the connection between the HAS survey and the RTM	15			
	Demonstrates an understanding of the purpose of Continuous Household Activity Survey Program (CHASP)	20			
	Demonstrates an understanding of the connection between the CHASP survey and the RTM	15			
	Demonstrates an understanding of the needs of the Monitoring Program	15			
4.1.2	Project Team Qualifications				
	Project team structure	5			
	Individual team member role & qualifications	15			
4.1.3	Project Experience				
	Team experience with Household Activity Surveys and Continuous Household Activity Surveys of similar size and scope and references	25			
4.1.4	Proposed Price See Evaluation of Proposal Price	N/A		N/A	100
	Maximum Total Points				1400



4.1 EVALUATION CRITERIA

Provide the following information within your proposal in relation to the project team or individual that can be provided by your firm to work on this project. Note that this is a minimum listing of requirements only. The City is looking for indications that your firm has the experience, expertise, capability and capacity to successfully complete this project. Any additional and relevant information that you provide to demonstrate this will be considered and assist the Evaluation Committee in the selection process.

4.1.1 PROJECT UNDERSTANDING AND METHODOLOGY

- .1 Provide a written (maximum 2 page) summary of the understanding of the project goals and stakeholders.
- .2 Show expert knowledge and understanding of the overall project purpose, scope, and requirements.
- .3 Show understanding of needs of the Regional Transportation Model

4.1.2 PROJECT TEAM QUALIFICATIONS

- .1 Provide a project organization chart of the core project team including the roles and responsibilities of each team member.
- .2 Identify those individuals who will be assigned key roles in all stages of the project, the city where they are currently geographically based and their ability and availability to provide services in Calgary over the duration of the project.
- .3 Describe how the Proponent’s staff will be organized and deployed. Identify the person who will assume responsibility for managing project deliverables and serve as the Proponent’s main point of contact.
- .4 Describe the composition of the proposed core project team to be assigned with reference to applicable skill sets, credentials and experience in delivering projects comparable to the projects identified in this RFP.
- .5 Describe the plan to acquire and maintain the field staff necessary to successfully deliver the number of fully qualified completed responses in the allocated time.

4.1.3 PROJECT EXPERIENCE

- .1 Describe and provide examples of prior large scale field work completed by the Proponent.



- .2 Describe and provide examples where the Proponent has concluded work for transportation lines of business.
- .3 Describe and provide examples where the Proponent has performed data expansion on a large scale to arrive at an expanded data set.
- .4 Describe and provide examples where the Proponent has employed innovative designs, management systems, and approaches that have provided additional value to clients in past projects.
- .5 Describe any additional value added services that the Proponent can offer to The City.
- .6 Provide a minimum of two (2) relevant and current references. With each reference provide:
 - a) the reference company’s name, address, e-mail and phone number;
 - b) the name and position of a contact person.The City reserves the right to contact only the references of the shortlisted firms.

4.2 Proposals will be evaluated and ranked according to the outline below. The evaluation will be based on a 0 to 10 scale.

Rating	Description
10	Exceeds expectations; Proponent clearly understands the requirement, excellent probability of success.
8	Somewhat exceeds expectations; high probability of success
6	Meets expectations; Proponent has good understanding of requirement, good probability of success.
4	Somewhat meets expectations; minor weakness or deficiencies, fair probability of success.
2	Does not meet expectations or demonstrate understanding of the requirements, low probability of success.
0	Lack of response or complete misunderstanding of the requirements, no probability of success.

- .3 The score of each criterion will be determined by multiplying the criteria weight by the rating. The sum of all scores will be the total score.
- .4 The City reserves the right to reject any proposal that receives a rating of zero (0) on any criteria.



4.3 Evaluation of Proposal Price

The lowest compliant Proposal Price will obtain the maximum rating and all other compliant Proposal Prices will be rated using the following formula:

1. All prices proposed should be in Canadian Currency. If not stated otherwise, The City will assume prices quoted are in Canadian Funds.
2. The rate multiplier for this category will be based on the formula below.

$$\text{E.g. } \frac{\text{lowest compliant Proposal}}{\text{lowest compliant offer}} \times 100 = 100 \text{ points}$$

$$\frac{\text{lowest compliant Proposal}}{\text{next Proposal total cost}} \times 100 = ? \text{ points}$$

5.0 PROPOSAL EVALUATION

- .1 The selection committee will score in accordance with the matrix provided. It is the intention of The City to shortlist the highest evaluated Proponents.
- .2 The short-listed Proponents may be required to participate in a Presentation / Interview process with the selection committee. Generally, one hour is allowed for this process, with 30 minutes for the presentation and 30 minutes for the interview.
- .3 The selection committee will then revisit their scoring matrix after the Presentation / Interviews and proceed with a recommendation for the highest evaluated Proponent.
- .4 The City may then negotiate a final contract with the highest evaluated Proponent in accordance with Clause 28.1 of the Conditions of Proposal.
- .5 In the event that one Proponent scores significantly higher than the other firms, the right is reserved by the selection committee to eliminate the Short Listing Process and proceed directly to negotiations with the highest rated firm.
- .6 Throughout all stages of the evaluation process, the evaluation committee may, at its discretion; seek additional clarification on any aspect of the Proposal; and perform reference checks as required to verify or clarify the information provided and to obtain additional performance information.



PRICE DETAIL SHEET

All prices proposed should be in Canadian Currency.

Include in the proposed pricing any applicable travel, lodging, living expenses as well as any other associated costs.

DELIVERABLE	PRICE
Household Activity Survey (HAS) Design	
Continuous Household Activity Survey Feasibility Study	
PRICE OF PROPOSAL	
GST	
TOTAL PRICE OF PROPOSAL	

Name of Business Entity:

Authorized Representative:

Printed Name
